

# Email Capture and History

## CCS Service Request for Microsoft SharePoint

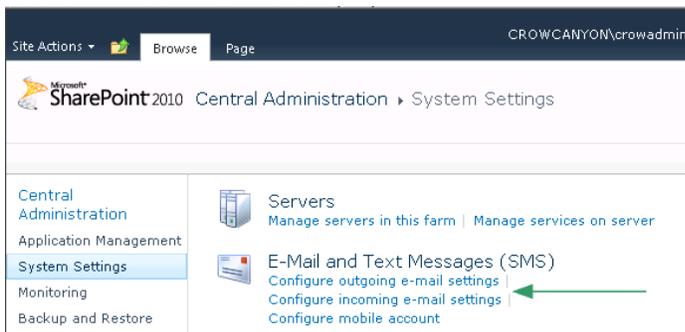
Crow Canyon Systems, Inc.  
<http://www.crowcanyon.com>  
<http://www.sharepoint-applications.biz>

### Overview

Initial emails from users need to create new tickets. Emails between users and staff that concern a ticket need to be associated with that ticket and readily available for review. CCS Service Request includes Email Capture and History that provides this functionality for both incoming and outgoing emails.

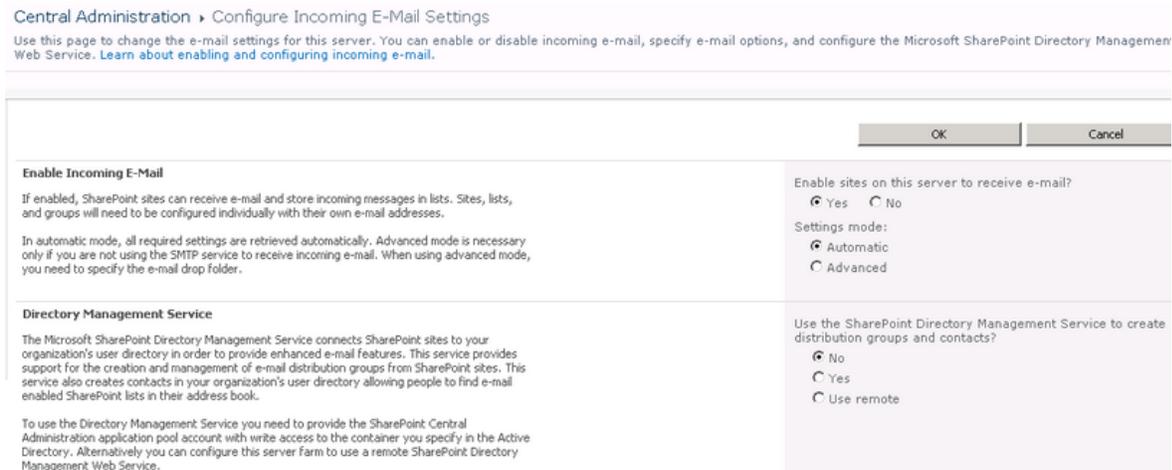
### Configuring Incoming Email and setting up Email Address of the SharePoint list

The SharePoint server must be configured for Incoming Email. This is set up in the Central Administration/System Settings/E-Mail and Text Messages (SMS)/Configure incoming e-mail settings



### Configure incoming e-mail settings in Central Administration

The choices on the right are used to setup the incoming email. See settings below.

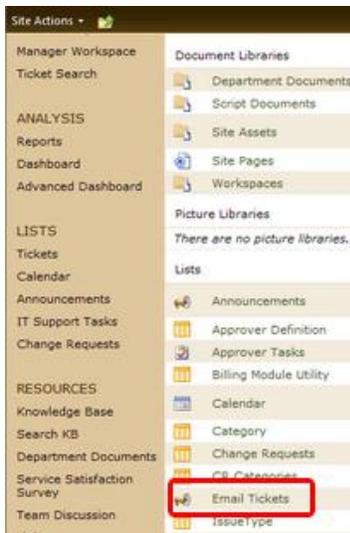


<p><b>Incoming E-Mail Server Display Address</b></p> <p>Specify the e-mail server address that will be displayed in web pages when users create an incoming e-mail address for a site, list, or group.</p> <p>This setting is often used in conjunction with the Microsoft SharePoint Directory Management Web Service to provide a more friendly e-mail server address for users to type.</p>	<p>E-mail server display address:</p> <p>mylist @ <input type="text" value="focusonsharepoint.com"/></p> <p>For example, mylist@example.com</p>
<p><b>Safe E-Mail Servers</b></p> <p>Specify whether to restrict the set of e-mail servers that can route mail directly to this server farm. This setting can help ensure the authenticity of e-mail stored in SharePoint sites. Enter one IP address per line in the format "11.22.33.44" or "11.22.33.44, 255.255.0.0".</p>	<p><input checked="" type="radio"/> Accept mail from all e-mail servers</p> <p><input type="radio"/> Accept mail from these safe e-mail servers:</p> <div style="border: 1px solid gray; height: 30px; width: 100%;"></div>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

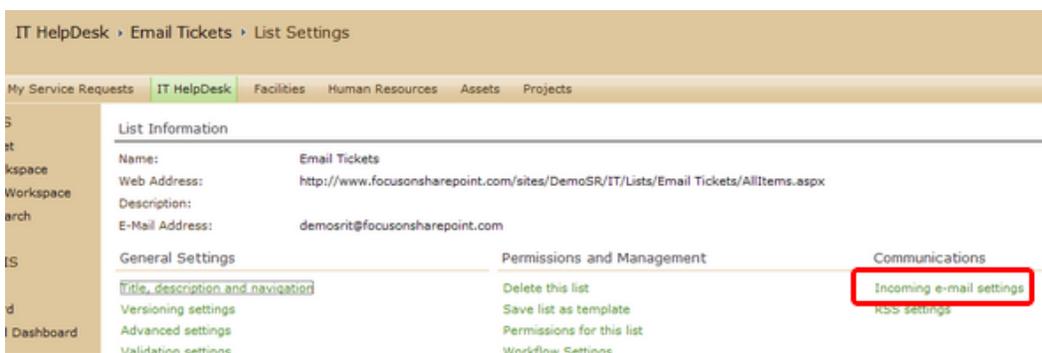
### Setting up Incoming Email Settings on the “Email Tickets” list

Once the set up in Central Administration is done, configuration is done on the list in CCS Service Request that receives the email. That is the “Email Tickets” list. This list has a workflow on it that runs when an email arrives. If a new email (no [Caseid] in the Subject line), the workflow converts it to a new ticket in the Tickets list and sends out any “New Ticket” notifications. If the email is related to an existing ticket (that is, [Caseid] is in the Subject line), it associates the email with the ticket with that ID.

The “Email Tickets” list can be accessed through “All Site Content” of a Service Area, such as the Help Desk service area Site:



Clicking on Email Tickets opens the list. “Incoming Email Settings” is in List/List Settings, under Communications. If “Incoming Email Settings” is not there, it means incoming email was not configured in Central Administration (see above):



“Incoming email settings” is where the email address is set up. See other settings below.

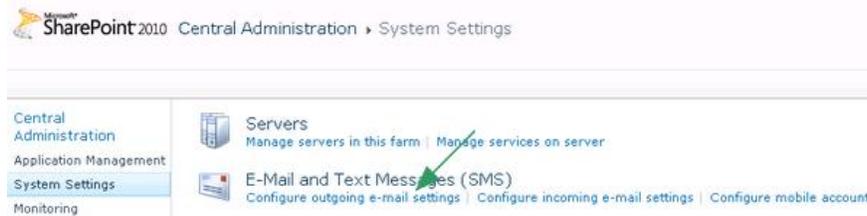
The screenshot shows a dialog box titled "Incoming E-Mail" with several sections:

- Incoming E-Mail:** "Specify whether to allow items to be added to this list through e-mail. Users can send e-mail messages directly to the list by using the e-mail address you specify." It includes a radio button for "Yes" (selected) and "No", and an "E-mail address:" field containing "demonit@focusonsharepoint.com".
- E-Mail Attachments:** "Specify whether to save attachments included with an incoming e-mail message as attachments to the item created in this list." It includes radio buttons for "Yes" and "No" (selected).
- E-Mail Message:** "Specify whether to save the original .eml file for an incoming e-mail message." It includes radio buttons for "Yes" and "No" (selected).
- E-Mail Meeting Invitations:** "Specify whether to save e-mailed meeting invitations in this list." It includes radio buttons for "Yes" and "No" (selected).
- E-Mail Security:** "Use list security for e-mail to ensure that only users who can write to the list can send e-mail to the list." It includes a "Caution:" note and radio buttons for "Accept e-mail messages based on list permissions" and "Accept e-mail messages from any sender" (selected).

At the bottom, there are "OK" and "Cancel" buttons.

## Configuring Outgoing Email in Central Administration

Outgoing email is used when a Staff member sends an email from the ticket to the user. The Outgoing Email Settings are set up in Central Administration/System Settings/E-Mail and Text Messages (SMS)/Configure outgoing e-mail settings.



## Configure outgoing e-mail settings in Central Administration

The choices on the right are used to setup the outgoing email. The From and Reply-to addresses are used when sending outgoing email.

The screenshot shows the "Outgoing E-Mail Settings" page. It includes a "Mail Settings" section with instructions: "Specify the SMTP mail server to use for Microsoft SharePoint Foundation e-mail-based notifications for alerts, invitations, and administrator notifications. Personalize the From address and Reply-to address." The right side contains several input fields:

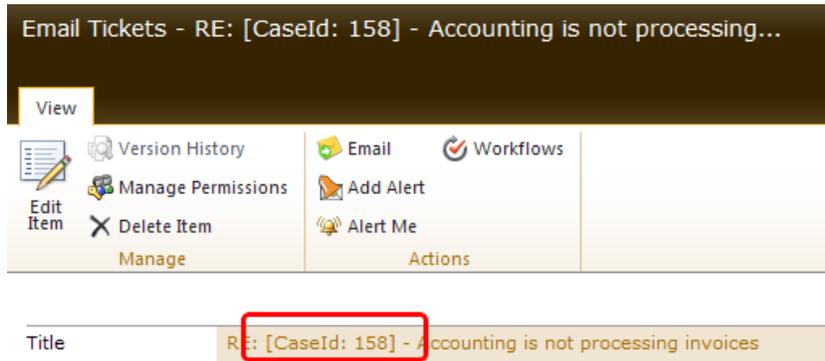
- Outbound SMTP server:** "mail.CROWCANYONSPFV"
- From address:** "info@crowcanyon.com"
- Reply-to address:** "info@crowcanyon.com"
- Character set:** "65001 (Unicode UTF-8)"

At the bottom, there are "OK" and "Cancel" buttons.

## Workflow on Email Tickets list

The Email Tickets list has a SharePoint workflow that converts the email to a ticket or associates the mail with an existing ticket. Whether to create a new ticket or associate the email is determined by a [Caseid] indicator in the Subject of the email. If [Caseid] is there, it is associated with the ticket with that ID. If not, a new ticket is created.

Email with ID:



## Field Mapping

The body of the email can contain a syntax that allows the workflow to map data in the body to fields (columns) on the ticket. Below is the syntax to map incoming email to a ticket:

- 1) Subject needs to end with "\$mapping", e.g., "Problem with printer \$mapping". This is usually done programmatically by code in an add-on to Outlook or in web pages that generate emails. More detail below in the [Incoming Email from Users](#) section.
- 2) All the fields that require mapping need to be on separate lines. The format needs to be **Display Name of the field on the Ticket: Value of the field**, such as:  
Priority: High  
Category: Hardware Problem

Note that this will work for custom fields that are added to the SharePoint Tickets list.

## After Configuration: Incoming Email from Users

Often, a request or question is sent in by email by the end user. This can come from any mail client. The email is simply addressed to the email address of the Email Tickets list. There are some special cases that deserve attention:

### If using Microsoft Outlook

If the email is coming from Microsoft Outlook, the CCS Service Request system includes an optional module that puts a button on the user's Outlook Toolbar. When this button is pressed, it generates an email to the SharePoint ticket list that is pre-addressed to the SharePoint list and includes details from

Active Directory about the user. It also can include the computer name of the computer that the email is sent from. This is an optional module available at extra cost. Contact [Sales@sharepoint-applications.biz](mailto:Sales@sharepoint-applications.biz) for details if this was not purchased.

Note that the emails can be sent from Microsoft Outlook without this module in the same manner that any email is sent from Outlook.

### **A web form can be used**

Usually, in CCS Service Request, users who want to use a web browser to create a ticket will simply go to SharePoint and create the ticket. But on occasion, there is a need for users to go to a Web Form (not SharePoint) to create a ticket. CCS Service Request provides web pages with code that will take the data from the web form, put it in an email in a structured format, and send it to the SharePoint list. The workflow on the SharePoint list “parses” the email and maps the fields from the body of the email to fields on the ticket. This mapping is explained more in the [Field Mapping](#) section of this document.

### **Incoming Emails become new tickets**

If an email does not have [Caseid] in the Subject, a new ticket is created in the Tickets list. Fields from the email body are mapped to fields in the ticket if the “\$mapping” indicator is at the end of the email subject line (explained in the [Field Mapping](#) section of this document).

Notifications are sent out according to the settings in the New Ticket Utility list, as explained in the “Notifications” section of the Application Administrator Manual, available at <http://www.sharepoint-applications.biz/manuals/AdminManual-ApplAdminWorkspace.pdf>

### **Incoming Emails associated with existing tickets**

If an email has [Caseid] in the Subject, then the email is associated with the ticket with that Case ID. The email is kept in the Email Tickets list and is available when viewing the Email History of a ticket.

### **Outgoing emails from the Ticket**

When a ticket is opened in View mode (not Edit), an Email button is available on the ribbon of the ticket form. This is used to send email to the user. These outgoing emails are captured and made part of the Email History for the ticket.



Employee	Staff	Knowledgebase	Time Tracking	Change Management
Case Id	158			
Title	Accounting is not processing invoices			
Category	Software			
Issue Type	Accounting Software			
Additional Information				

The Email button is pressed and an Email comes up that can be edited and then sent (or canceled). Note that the From, To, CC and other fields can be changed.

**Email**

From:

To:

Cc:

Subject:

Body:  Click to show or hide body  
[Click here to see list item](#)

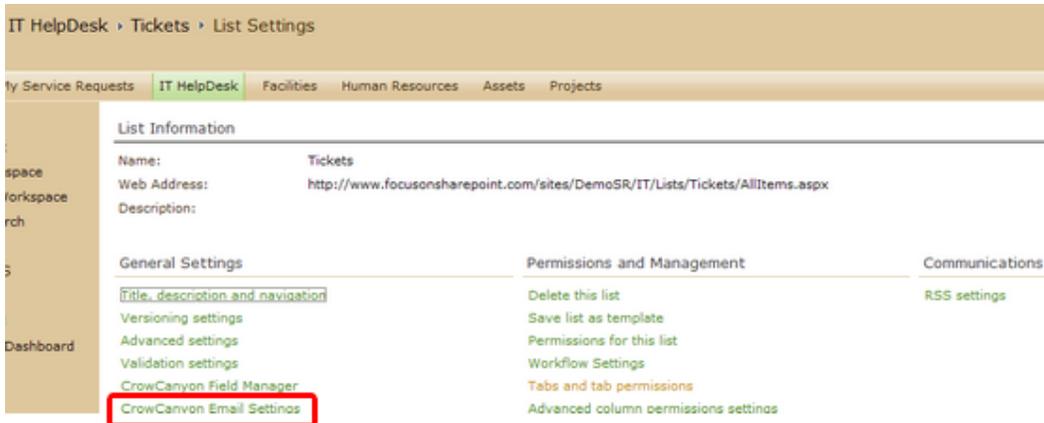
**Notification: Accounting is not processing invoices**

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**Title** Accounting is not processing invoices  
**Category** Software  
**Issue Type** Accounting Software  
**Requester** Darrell Trimble  
**Assigned Staff** Linda Hatch  
**Add Contact**

### CrowCanyon Email Settings

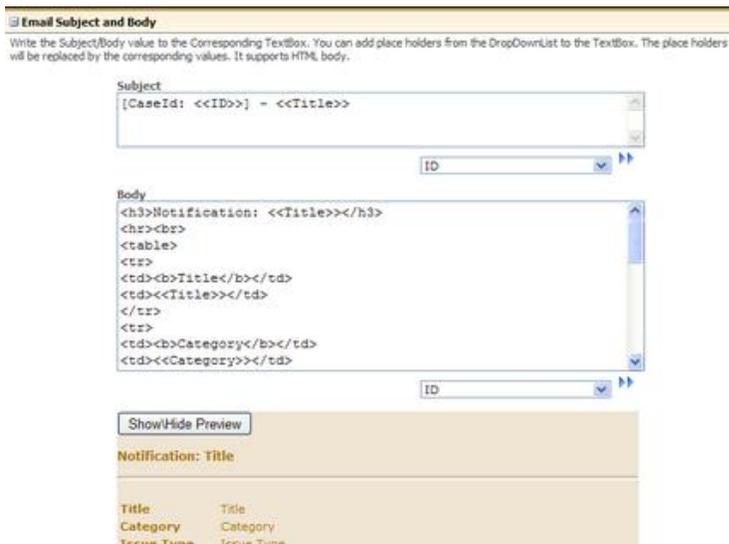
Settings for outgoing emails are configured in CrowCanyon Email Settings in the List Settings of the Tickets list.



Click **CrowCanyon Email Settings** to open it. The **Email To** section determines who the email is sent to (the TO line). There is also an option to add email addresses that should always be sent outgoing emails.



The **Email Subject and Body** section determines what the Subject and Body of the outgoing email should be. HTML markup is used along with << field >> to indicate placeholders for fields from the ticket. There is also a Show/Hide Preview button that shows/hides what the email will look like.



The **Advanced Email Options** section allows the choice of the default From field, whether to include a link back to the item (the ticket) in the email, and where to store the outgoing email once sent. The link back to the ticket allows users who get the email to click a link and open the ticket.

**Advanced Email Options**

Use these advanced options to save a copy of email and to include a link in email to the current list item.

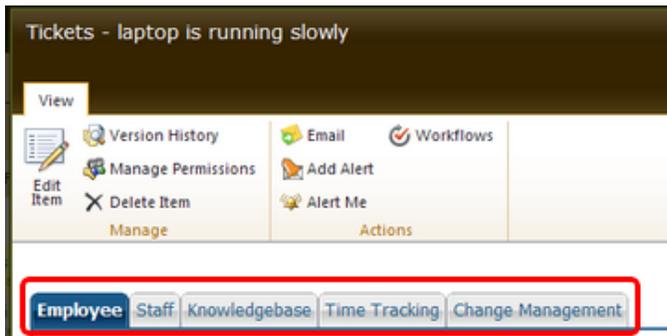
Choose default from address here:

Check the right side check box to include link in the email to the DispForm of the current list item.  Include Link

Check the right side check box and select a list from dropdown if you want to save a copy of email. To create your own list to save a copy of email, write the name of the list into below Text Box and click on Create. Creating new list is recommended.  Check to Save a copy

## Viewing Email History

The emails associated with a ticket can be viewed from the Ticket. When on any of these tabs, the Email History is below the tab section. On a short tab, the Email History is viewable on the screen without scrolling. On larger tabs, such as Employee and Staff, the Email History is seen after scrolling down.



On Employee tab (must scroll to see Email History):

Tickets - Accounting is not processing invoices

View

Version History | Email | Workflows

Edit Item | Manage Permissions | Add Alert

Delete Item | Alert Me

Manage | Actions

Approver

Content Type: Item  
Version: 2.0  
Created at 7/5/2011 1:48 PM by Darrell Trimble  
Last modified at 7/5/2011 1:59 PM by Darrell Trimble

**Email History**

Title	Email Type	Related Ticket ID	E-Mail From	Created
RE: [CaseId: 158] - Accounting is not processing invoices	Incoming Email	158	Darrell Trimble <dtrimble@crowcanyon.com>	7/5/2011 2:01 PM
[CaseId: 158] - Accounting is not processing invoices	Outgoing Email	158		7/5/2011 2:00 PM

On Knowledgebase tab (do not have to scroll):

Tickets - Accounting is not processing invoices

View

Version History | Email | Workflows

Manage Permissions | Add Alert

Delete Item | Alert Me

Manage | Actions

Employee | Staff | **Knowledgebase** | Time Tracking | Change Management

Related KB Article

Create KB Article: No

Content Type: Item  
Version: 2.0  
Created at 7/5/2011 1:48 PM by Darrell Trimble  
Last modified at 7/5/2011 1:59 PM by Darrell Trimble

Close

Email History

Title	Email Type	Related Ticket ID	E-Mail From	Created
RE: [CaseId: 158] Accounting is not processing invoices	Incoming Email	158	Darrell Trimble <dtrimble@crowcanyon.com>	7/5/2011 2:01 PM

The **Email History** is a filtered view of the Email Tickets list that shows only items in that list that match the Case ID of the ticket. Each item in the list can be clicked on to open the email. The “Email Type” indicates if it was incoming (sent by user) or outgoing (sent by staff).