

Using Folder Views Effectively in CCS HelpDesk

Crow Canyon Systems, Inc.

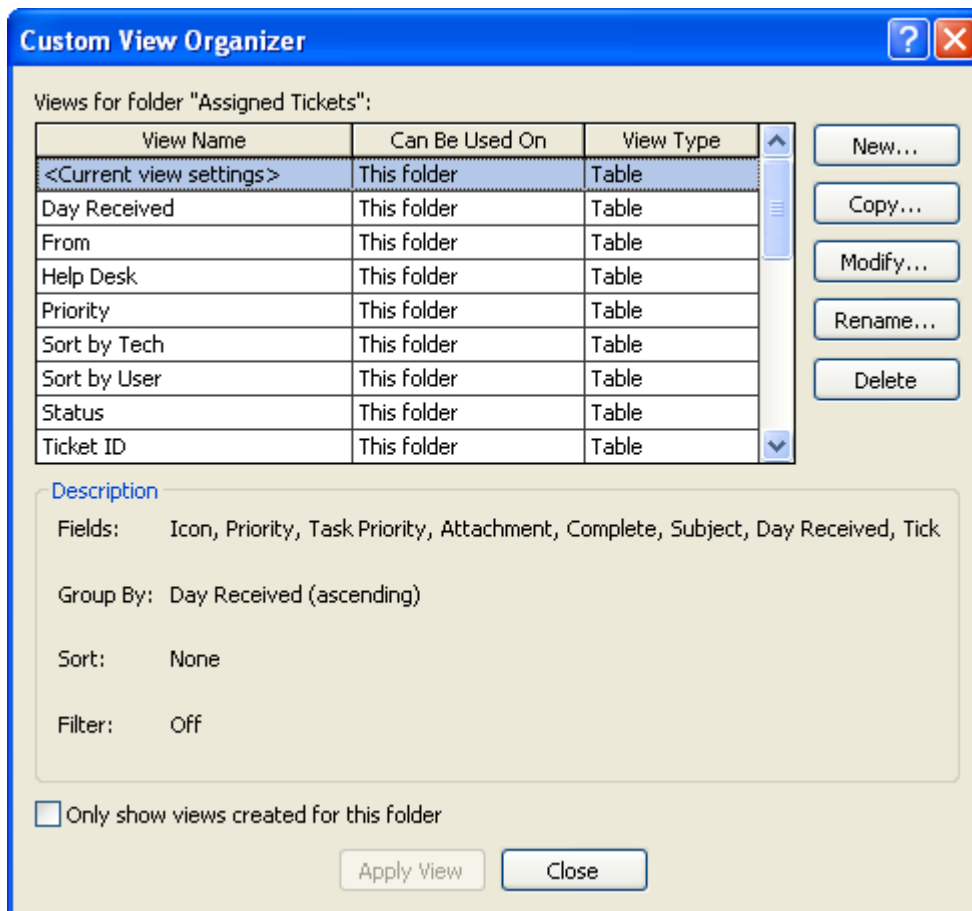
(Note: There is extensive documentation on grouping, sorting, filtering and displaying folder items in the Microsoft Outlook Help, "Organizing and Viewing Items in Outlook", but we will cover some basics here.)

Folder views are a powerful way to organize your Help Desk folders. 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 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.

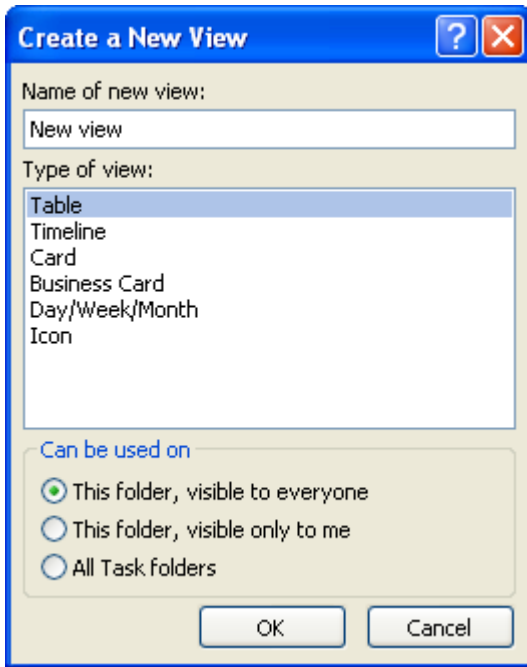
You can easily switch between views using the View/Current View list. To set the default view for the folder, right-click the folder, then choose Properties. Select the Administration tab and use the "Initial view on folder:" drop down list.

Folder views can be modified or new ones created in Outlook. Go to 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.

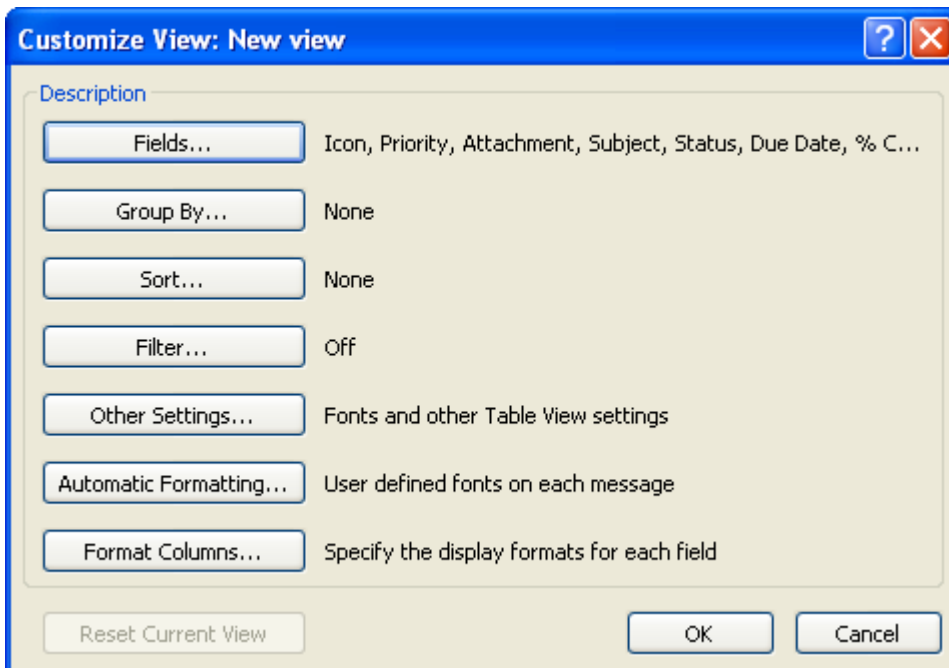
View/Current View/Define Views screen:



Choose **New** if you want to create a new (choose **Modify** to change a view). In the New screen below, you can choose the type of view (usually Table) and who can see it (usually “This folder, visible to everyone”). After pressing OK, the View Summary comes up.

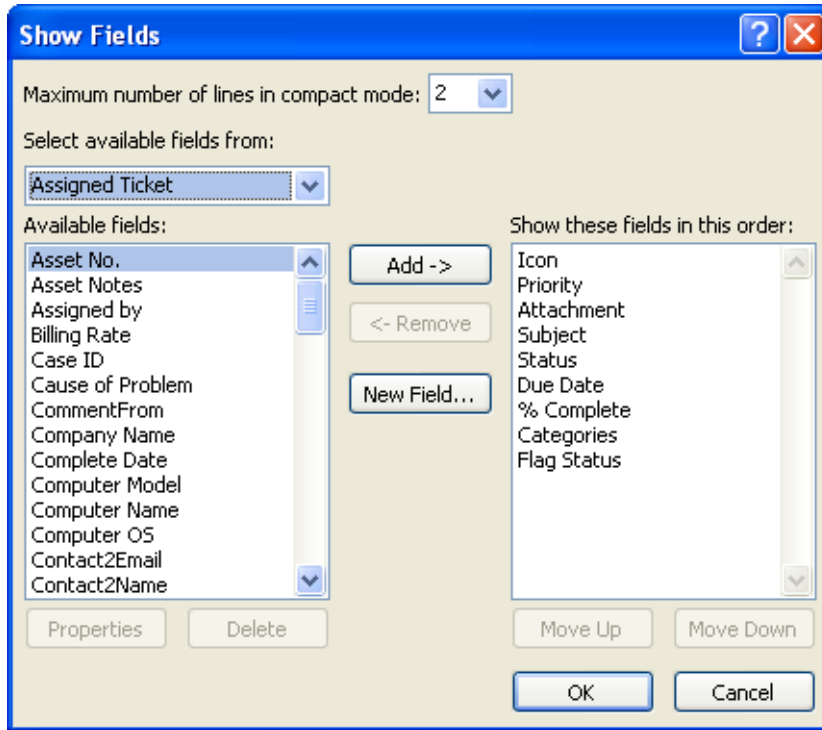


Pressing **Modify** (or pressing **OK** in the Create a New View screen) shows the View Summary.

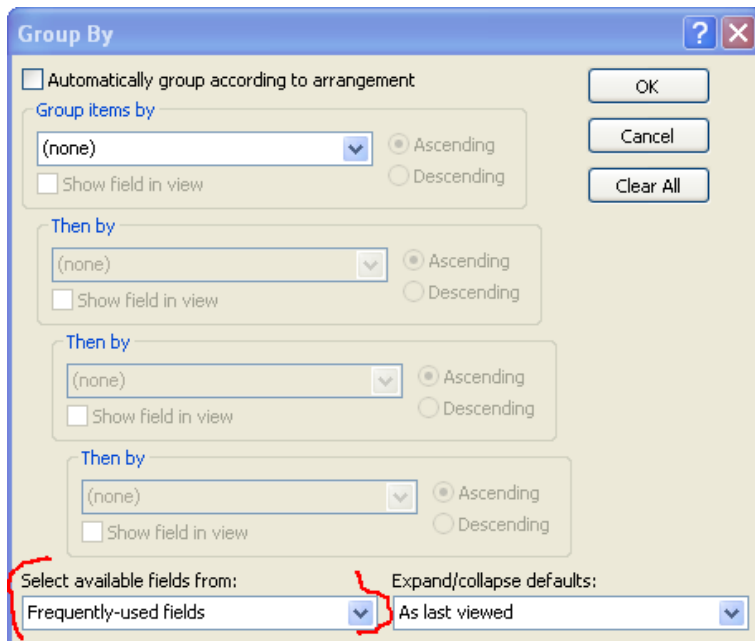


From this View Summary, you can create or modify views. The buttons give you many options on how exactly to set up your view. They are well worth exploring.

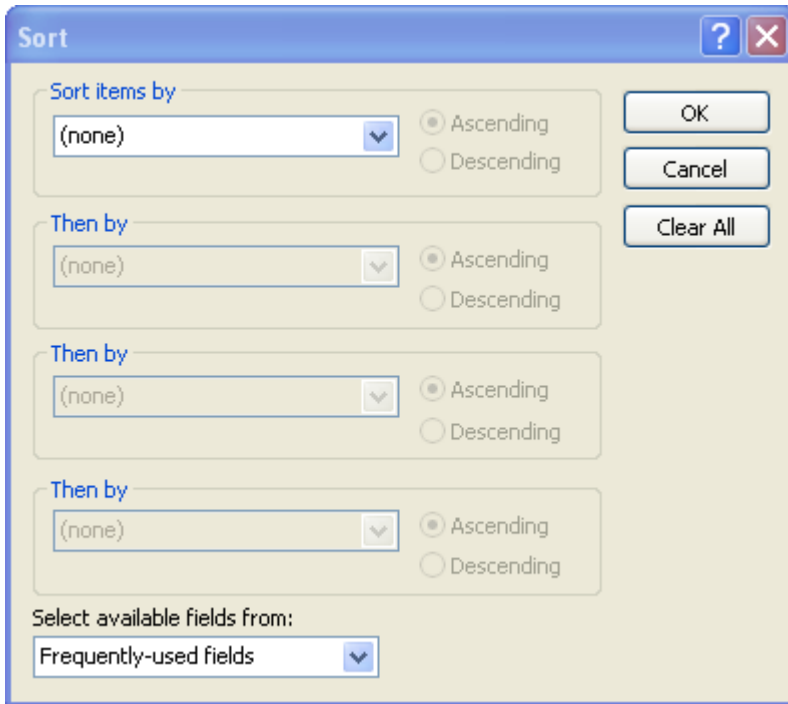
Fields allows you to select which fields to display and in what order. Use the “Select available fields from:” drop list to change the list of fields. Choose the custom Outlook form for the folder, such as “Assigned Ticket” for the Assigned Tickets folder, to use the custom fields in CCS HelpDesk. The standard fields for a Task are in the All Task Fields list.



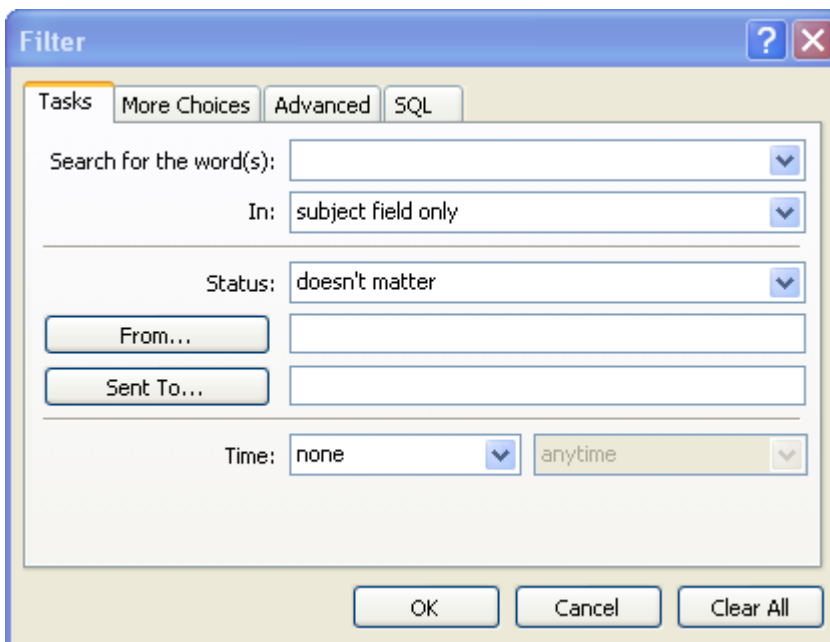
Group By allows you to group the items by the fields. There can be several levels of grouping. These can be in Ascending or Descending order. Use the “Select available fields from:” drop list to change the list of fields.



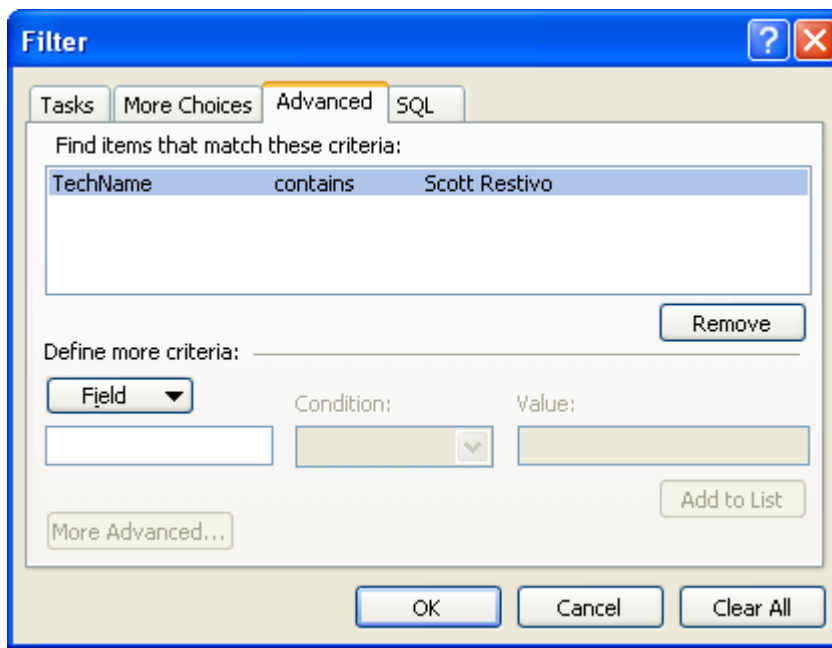
Sort allows you to sort the items by the fields. There can be several levels of sorting. These can be in Ascending or Descending order. Use the “Select available fields from:” drop list to change the list of fields.



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

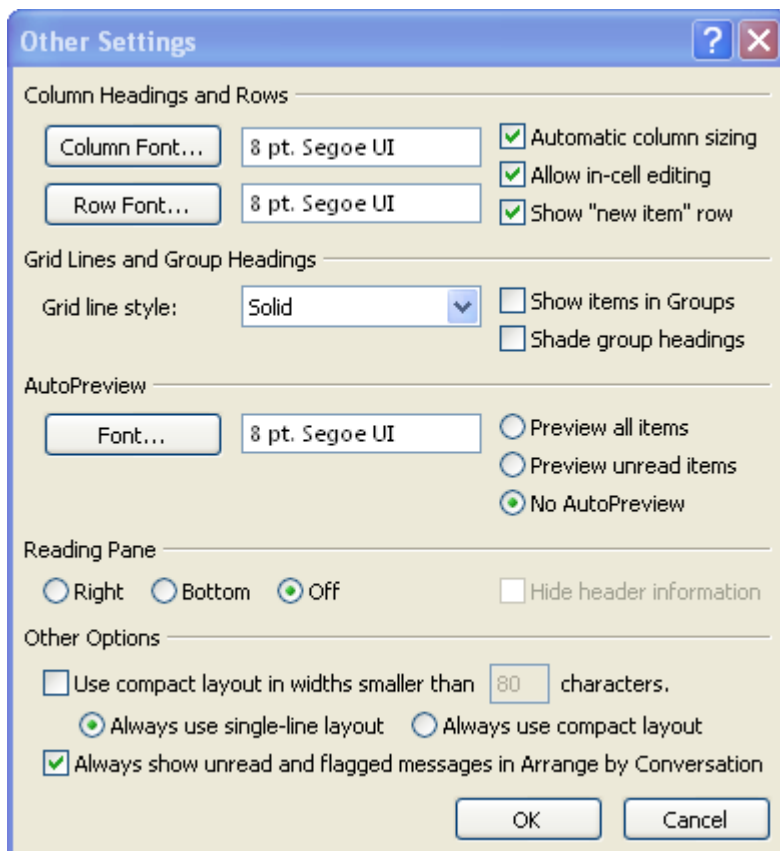


For example, Filtering can also be used to show only the tickets assigned to a Technician. By choosing the Advanced tab, then using Fields drop-down list to find the Assigned Ticket form, the Tech can select TechName as the field and put in his or her name in the value box. This will filter the view 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.

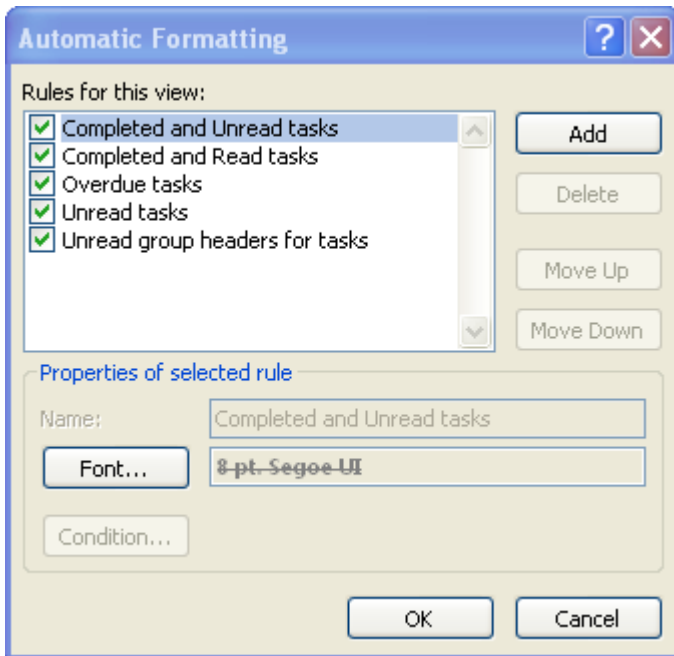


To show only the tickets for an End User, the same principle applies. Choose For User as the field and put the user's name in the Value box.

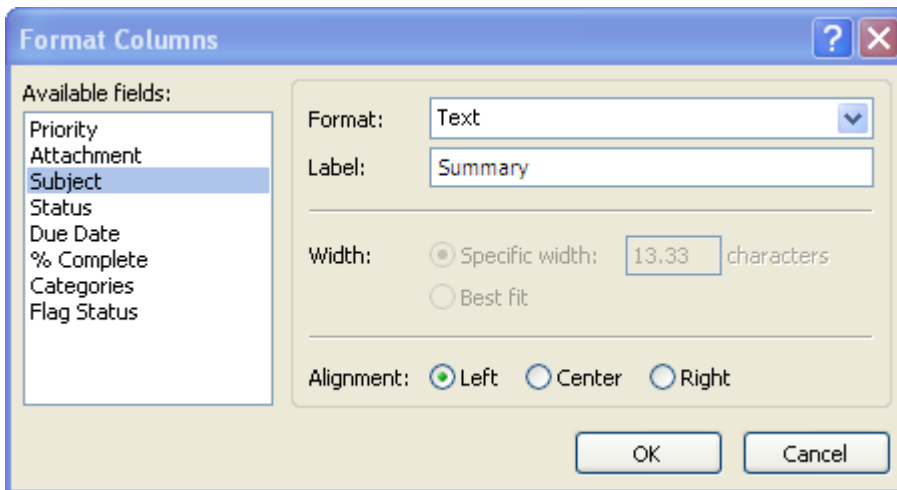
Other Settings has ways to set the fonts, etc., such as "Allow in-cell editing", which will let users change items without opening the ticket up, and "Show 'new item' row" which sets whether "Click here to open new" line shows at the top of the folder view. The "Click here" line is removed in the programs 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 change how the tickets are displayed. For example, 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.



Format Columns allows you to change the Label of the column. For example, here the Subject field has the column label set to read "Summary". This label is what will show in the folder view. This helps you know what the column contains if the actual field name is not sufficient.



It now says Summary instead of Subject, even though it is still using the Subject field.

