



## What's New in HelpDesk v5.5

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### Headlines

**V5.5 of the Vector HelpDesk is focused on increasing the effectiveness of Service Management operations through enhanced email integration and workflow management.**

With ever more demanding Service Level Agreements increasing the pressure on resolution times, it is critical that incoming issues are routed swiftly and if possible automatically to the most appropriately skilled support analyst. Vector HelpDesk v5.5 accomplishes this with a powerful new **Mailbox Workflow** rules engine to analyse incoming issue emails. Depending on the interpretation of the email content, the rules system invokes defined actions such as optimal routing for the issue, or can initiate another process.

In Vector's experience, many dispersed organizations use multiple mail servers. In response, HelpDesk v5.5 provides **Multi-server E-mail configuration** that enables the Mailbox Workflow engine to monitor email from multiple accounts and multiple e-mail servers. This capability is of course Web based so configuration details can be changed at any time, from anywhere.

Following the automatic generation of a new issue from an incoming new issue email, all email traffic generated in the course of submission, investigation and resolution of an issue is automatically linked into an easy-to-view **Issue History**.

These histories support **Issue text search**, facilitating finding related issues. *Average issue resolution times can be greatly reduced if analysts can exploit previous issue resolutions.*

Support operations gain a further boost in efficiency from the new on-line **Self-service Issue View**, which end users can use to both post issues to the help desk and review the status of their issues at any time without using analyst time. This view can also be used by the end user to add further information for the analyst – reflecting the reality that frequently the end user realizes there is more information for the analyst, at some time after posting the issue.

As an alternative to connecting to a Web site, users can request an **Emailed Status Report** at any time, simply by clicking a 'mailto' link that is sent out with the initial response to the receipt of the issue. Self service has to be simple and practical!

To streamline operations where the user population can change frequently, HelpDesk v5.5 can now be configured to **add users as new Contacts automatically** on receiving a new issue email.

### Edit Rule

Rule Name:

When all these conditions are met...

- Subject Contains
- <Field> Is Equal To
- <Field> Is Equal To
- <Field> Is Equal To
- <Field> Is Equal To
- Has Attachments
- E-mail contains number identifier (ID: #) of existing issue in Subject field

Perform the following actions...

- Integrate e-mail with HelpDesk:
  - Create New Issue using [these values](#)
  - Send to Queue
  - Link to Issue
- Send an e-mail to <Reply To Sender>
- Send an e-mail to <None>
- Run program

Once an e-mail matches a Rule's conditions, that Rule's actions are executed. Afterwards, the next e-mail in the list is considered - without evaluating the remaining Rules.

OK Cancel

## Mailbox Workflow

Define rules for automatically creating issues and assigning them to the proper teams.

Create rules for linking e-mails to issues, for sending automatic e-mail responses and to automatically modify the priority or progress of issues from incoming e-mails.

Configure your system to automatically handle an issue with highest priority if it was sent from a VIP sender.

Create rules for ignoring specific e-mails or SPAM messages so they are not converted to issues neither added to the general queue.

Control your e-mail pipeline with due dates automatically set according to your schedules for each department.

## Multi-server Web based E-mail configuration

Web based interface for managing incoming e-mails from different accounts and different e-mail servers. Integrate with one or several e-mail servers regardless of their location.

### Edit E-mail Integration Account

**Incoming E-mail Server (POP)**  
HelpDesk can be configured to watch specific E-mail addresses and automatically create issues from the e-mails sent to it. Enter the details for an address you want HelpDesk to watch.

**Account Information**  
E-mail Address:

**Server Information**  
 Hostname:   
 Port:

**Logon Information**  
 Logon:   
 Password:

Test

**Mail Handling**  
Mail-handling rules determine how messages sent to this account are converted to issues. The rules are processed in order. If all the conditions of the rule are met, the actions of the rule are executed, and no more rules are evaluated. If all conditions are not met, the next rule is evaluated.

Rule Name	Action Type	
Send Status Report	None	Add...
Link to Issue	Link	Edit...
Create new Issue	Create	Copy...
Add E-mail to Queue	Queue	Disable
		Remove
		⬆ ⬇ ⬇ ⬆

**Issue Completion**  
Issue-completion rules determine the values that will be given to each field in an issue. Click Edit Mapping to specify the issue fields that can be copied from the e-mail. Click Edit Defaults to specify default values for non-mapped fields.

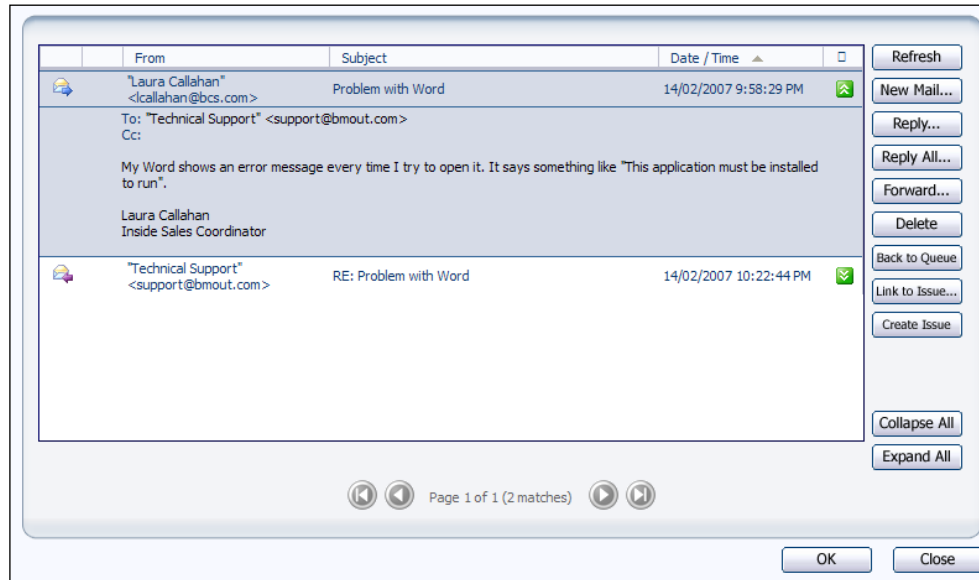
Enable this integration.

OK Cancel

Remotely configure your mail settings and manage rules and actions from anywhere.

## Issue History: View and manage e-mail conversation in the issue

Automatically attach all incoming and outgoing e-mail conversation to the related issue. Ensure e-mail responses back from users are part of the existing issue or ticket.



Automatically or manually create call tickets from new e-mails that arrive into mailboxes.

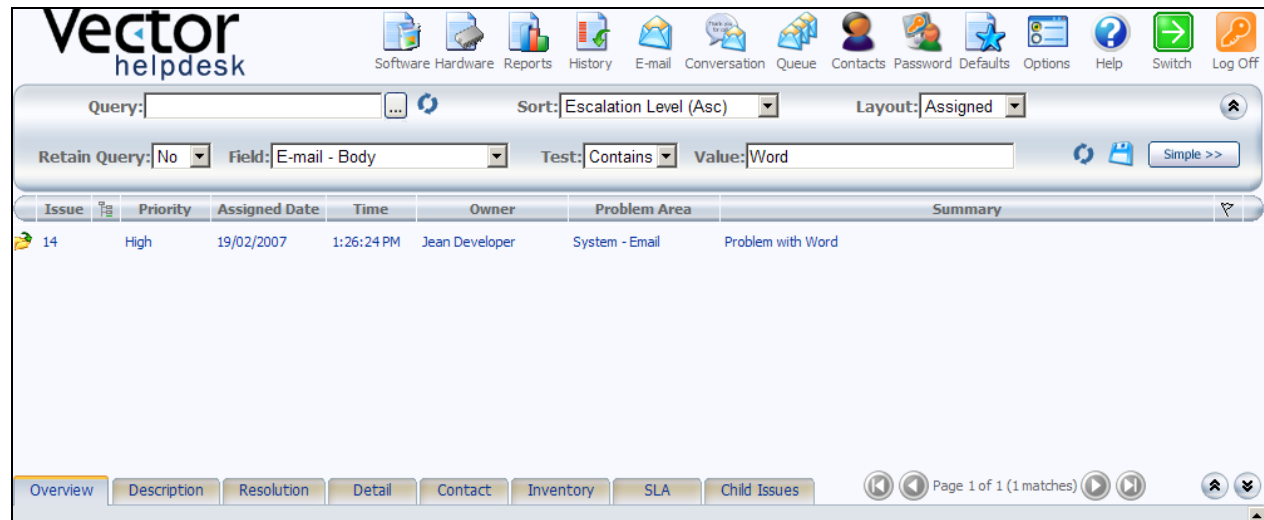
Eliminate the highly inefficient task of going back and forth between applications to check information about the issue and the correspondence. Remove the need to look for other people's e-mail in

order to follow up the issue. Regardless of who within your organization sends the e-mail linked to HelpDesk, you can access it from anywhere through the Web.

Reassign issues without concern knowing that the new person will have easy access to all the history and communication.

## Search issues based on e-mail content

Increase productivity exponentially by unlocking the knowledge held in other issues, using text search of issues or tickets based on text that was included in related e-mails.



## Activity Log

The Activity Log provides all the information about the actions taken to solve the issue in a comprehensive and simple way, automatically keeping track of all the e-mail communication.

Readily available and conveniently displayed in an integrated timeline, the Activity Log increases efficiency and reduces the time spent in solving incidents and problems.

The Activity Log eliminates the highly inefficient task of going back and forth between applications to check information about the issue and the correspondence with the customer or end user (contact).

With Vector HelpDesk, you have complete and simple access to all the information about the issue, the contact and the correspondence in chronological order, regardless of whether it was exchanged with you or with other employees.

The screenshot displays the 'Activity Log' for Issue ID 12. The interface includes a navigation bar with tabs for Overview, Description, Resolution (selected), Detail, Contact, Inventory, SLA, and Child Issues. The main content area shows three email messages in chronological order:

- Message 1:** From "Support Staff" <support@mycompany.com> to "Catherine Langley" <clangley@company.com> on 4/2/2007 2:27 PM. Subject: RE: Outlook startup error (Issue ID: 12). Content: Mrs. Langley, You must contact the administrator, and ask that the permissions necessary for this action be granted to you. (view e-mail)
- Message 2:** From jsmith (New) on 4/2/2007 11:42 AM. Content: This seems to be due to permissions, will advise the client that she must contact the system administrator.
- Message 3:** From "Catherine Langley" <clangley@company.com> to "Support Staff" <support@mycompany.com> on 4/2/2007 11:29 AM. Subject: Outlook startup error (Issue ID: 12). Content: Hello, After installing installing Microsoft Office 2000 on Window NT, I get this error message when I first tried to start Outlook: "Cannot start Microsoft Outlook. Outlook could not be configured, because..." (view e-mail)

At the bottom of the interface, there is a search bar with 'Issue: 12' and a toolbar with buttons for New, Save, Copy, Cancel, and Print. The status bar indicates 'Ready. Click New to create a new issue.'

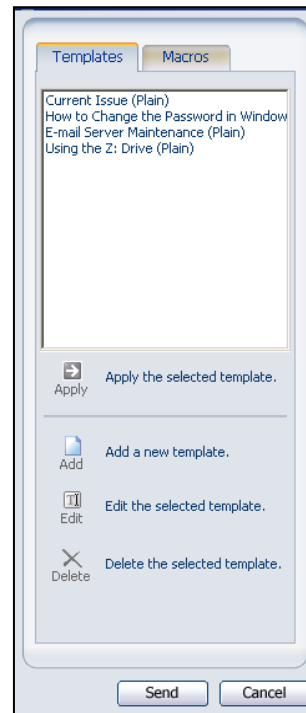
## E-mail Templates

Provide better, faster communication to boost customer service.

Reduce repetition and human error in the e-mail management and response process. Spend less time writing e-mails and more time solving issues.

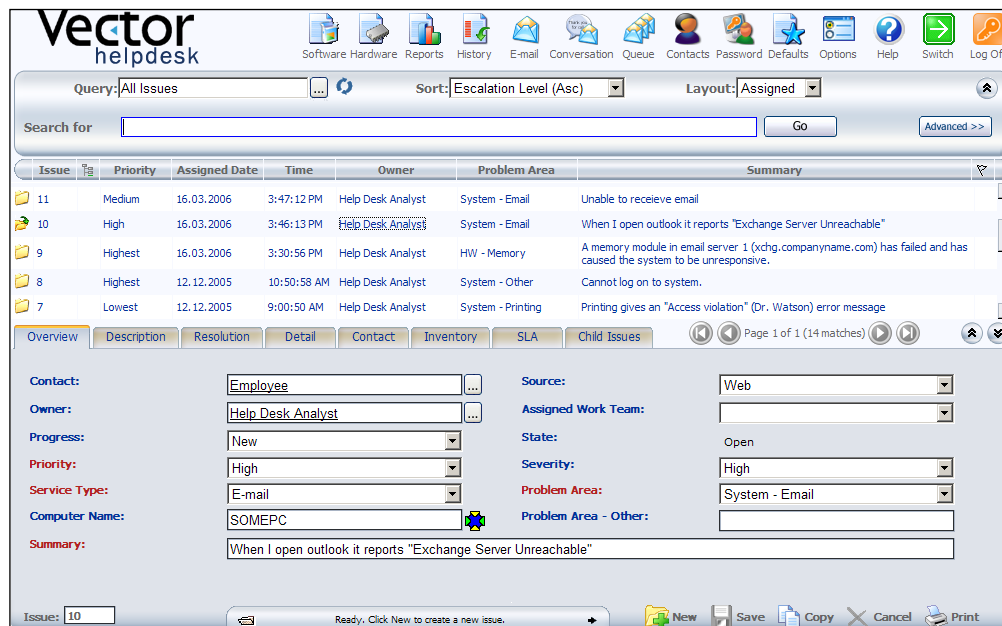
Use e-mail templates to keep standards, style and quality of your e-mails.

You can set standard responses and canned text for rapid responses to common questions as well as personalize the e-mail templates by using macros.



## Self-service View for users

Provide your customers or end users the power to submit new issues, check the status of pending issues and append new information.



Do all this from the Web, 24 hours a day, 7 days a week, allowing you to save on expensive support calls.

Combine Self-service with Knowledgebase Views for the most efficient Service Desk.

## User-Requested Status Report by E-mail

Built-in auto-reply e-mail allows Users or Contacts to quickly check the status of their issues in a simple way and without the assistance of support personnel.

Customize the content of the status reports with the powerful e-mail editor and macros.

Customize the e-mail that should be sent for this action.

To:

Cc:

From:

Subject:

Attachments:

Progress: <MqField:nSubstateID>  
Priority: <MqField:nPriorityID>  
Problem Area: <MqField:Problem\$Area>  
Owner: <MqField:nUserID>

Description:  
-----  
<MqField:mDetailedDescription>  
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Send e-mail to each recipient individually  HTML in Body  
 Save to Conversation/Queue

Available Macros

Click on a macro below to add it to the e-mail.

- <Contact>
- <Owner>
- <Previous Owner>
- <Reply To Sender>
- <Submitter>
- <Work Team Members>

OK Cancel

## Automatically create new Contacts from the e-mail

If your HelpDesk or Service Desk allows users to submit issues without previous registration in the system or in an Active Directory, you can take advantage of the automatic creation of contacts from e-mails. Automatically or manually create call tickets from new emails that arrive into the POP3 mailbox.

## Switch Web views

Each release of HelpDesk includes usability enhancements in addition to new features. In v5.5, users can switch Web views without having to log off and log on again.

