ServiceDesk Mail Merger

A new way to deliver emails

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Table of Contents

Why this tool

IT perspective

Automation of basic tasks is the best and easy way to give more time and attention to real issues the client is facing. Making e-mails is a boring task, a task that is repeatable and follow simple and repeatable process. From an ITIL standpoint, it is one of those process that should be automated as soon as possible.

Also, with the lack of good tools, multiples ways of doing the same things appear and create silo-ed solutions, repetitive processes, and are overall inefficient and does not meet all client's requirements.

Technical perspective

In a perfect world, mails should be done automatically using the ticketing system, or at least some automation tool like PowerShell.

As this is not an option, this tool had to be built from scratch using standard tools available to relieve technicians from most of the work involved in this task.

As a specialized tool, it follows exactly all demands and requirements for all the mail process involved at the service desks, and use tools that are already well integrated to most business (Service-Now, Office 365)

In simpler terms

- This tool semi automates mail reminders sending.
- It makes less work for technicians overall.
- It does have templates that are approved by management.
- Contain one-time mails templates just in case something goes wrong.
- Custom mail subjects with relevant info for tracking user's delivery.
- Personalized experience for users.
- Service desks image & process being the same everywhere.
- Less place for human errors and no respect of processes.
- Less users complaining overall.
- Strict respect of three strike rules equals less work that accumulate over time.
- User friendly, one time per day use, push a button tool.

Quick scenario to understand the tool

This is **Monday**, you check on **Service-now** the **delivery tasks** assigned to you.

You open the **Mail Merger**, and click on **verify RQT**, this give you a list of **RQT numbers**, you use them with your **favorite** on SNOW, and see some RQTs are already closed. You return to the Mail Merger and remove the lines from the sheets using the **Remove RQT** macro.

Now going back to Service-Now, you take the information of the new requests you received **on your dashboard**, and put it inside the tool, **put a tag on the RQT**, and get back again to the tool.

<u>Now that all your tasks are inside the tool</u>, you can send emails.

You start by the **reminders** mail, and since it's Monday, you use the **Weekend macro**.

The tool works for you following the process and give you **a list of RQT numbers**. You take those RQT numbers and update them in bulk on Service-Now.

You do the same for the others RQTs that are inside the tool, and **you're done** with sending mails for the day.

The next day you check your closed tasks, add the new one to the tool and send the daily reminders and the other kinds of mails if needed and repeat.

Installation & configuration of the tool

Installation

1. Download the package containing all files needed for installation.
2. Unzip the package wherever you want.
3. Enter the unzipped folder and right click on **INSTALL.bat** and execute as **administrator**.
   a. The folder will move itself and disappear, it's **normal**.
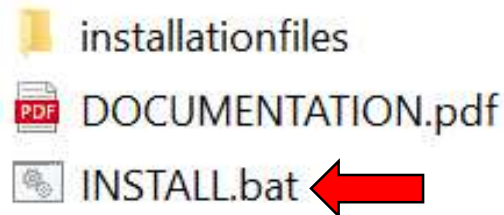
Configuration

1. Enter the newly created shortcut on your desktop.
2. Open **MailMerger.xlsm** which is the actual tool.
3. Inside the excel file, go to **__DATA__** sheet.
4. Fill in information in those cells:
   a. **City1** OR **City2.**
   b. **Service desk name** for your actual service desk.
   c. Your email.

YOUR CITY	YOUR SERVICEDESK NAME	YOUR EMAIL
City1	SDeskOne	mymail@domain.com

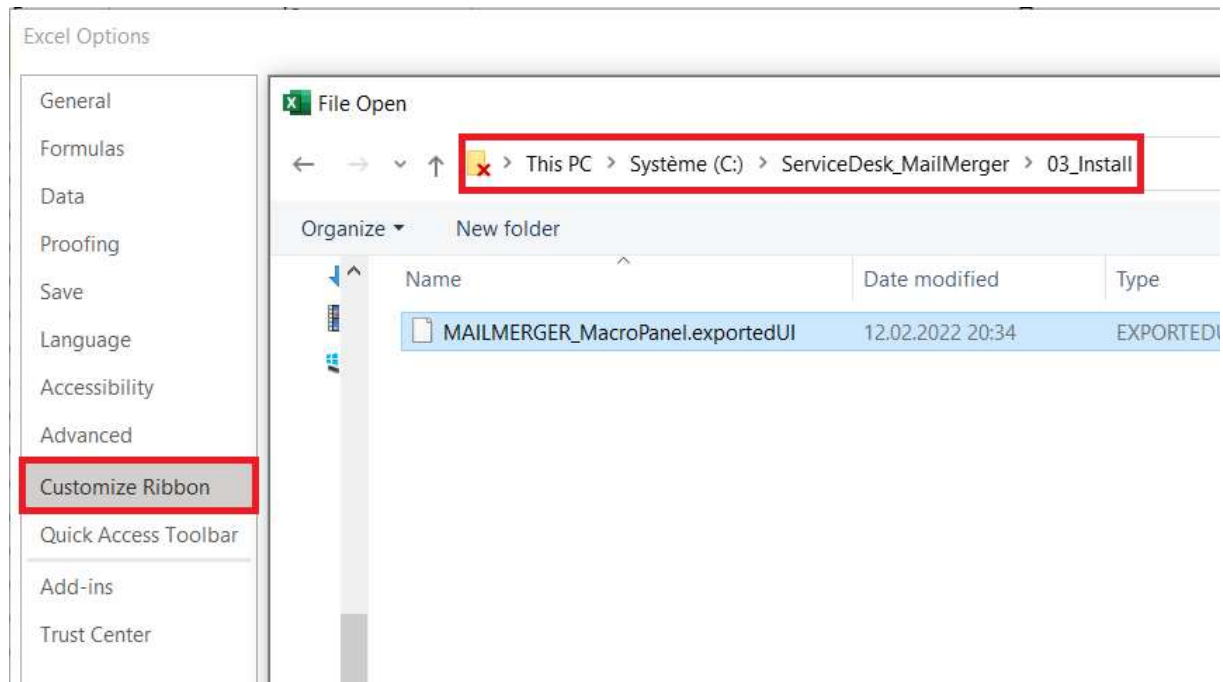**HINT**: Those settings can be changed when you change location.

Macro panel

<u>If you already have a custom ribbon in Office, please do export it for backup.</u>

Else, you can import this custom menu to launch the macros.
Go to **File – Option – Customize Ribbon and import the panel.**
File is in **C:\ ServiceDesk_MailMerger\03_Install**

Service now dashboard, reports and favorites

To find which task are assigned to you, please use service-now dashboards or special reports. What is necessary on your part is to check your tasks, copy data on the tool, and use the tool to follow the process.

Dashboard

MailMerge_RQT favorite

1. On Service-now, left search (*filter search*), search for **Tasks (catalog - tasks)** and click on it.
2. This opens a new window with all requests.
   - Click on the filter symbol and add the rule: **Number is one of [Empty box]**
   - Click on the gearbox and add/edit at least those columns:
     - *Request item | Number | Status | Work notes | Tags | Short description*

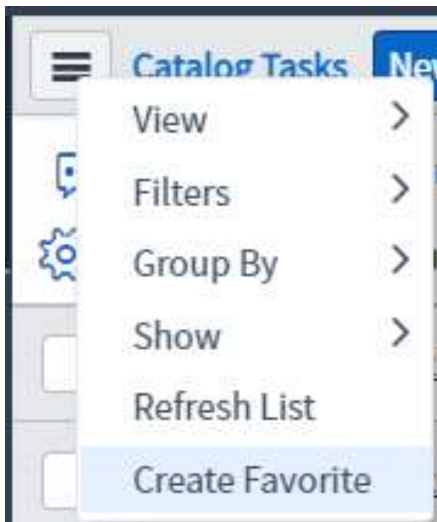This should look like this :
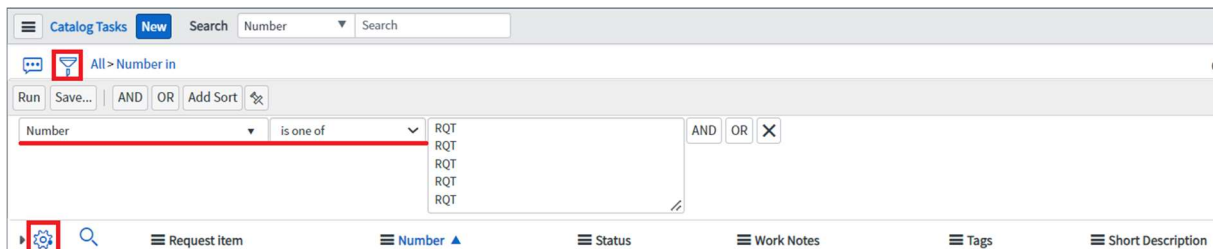
3. Then left click on **Status** "three bars" column, and group by status
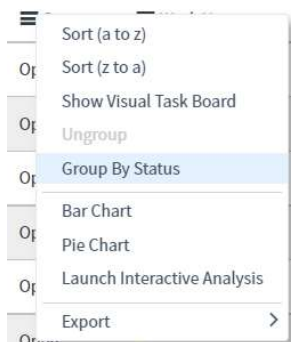
4. Then get back at the top, and click on the "three bars" symbols
5. Create a favorite, give it a nice name, a color and symbol to find it later.

Use the Service now favorites

When you get a list of RQT to check (**Verify RQT**) or to update (**after sending mails**), you can use this favorite: click on the filtering symbol, input the RQT numbers provided and click on **RUN**.
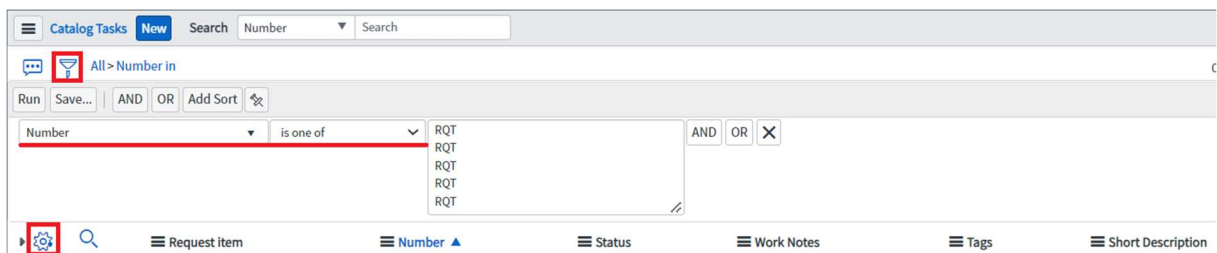
Then you can see if there is a RQT that you can remove from the tool with the **Remove RQT** macro.

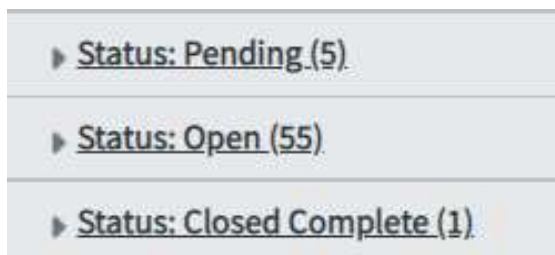# Adding mailboxes to Outlook

Cleaning old methods

Delete other profiles from outlook, you only need to have your personal mail profile.

Add mailboxes for the service desks

1) At the top of Outlook, click on **Files** - **Account Settings**
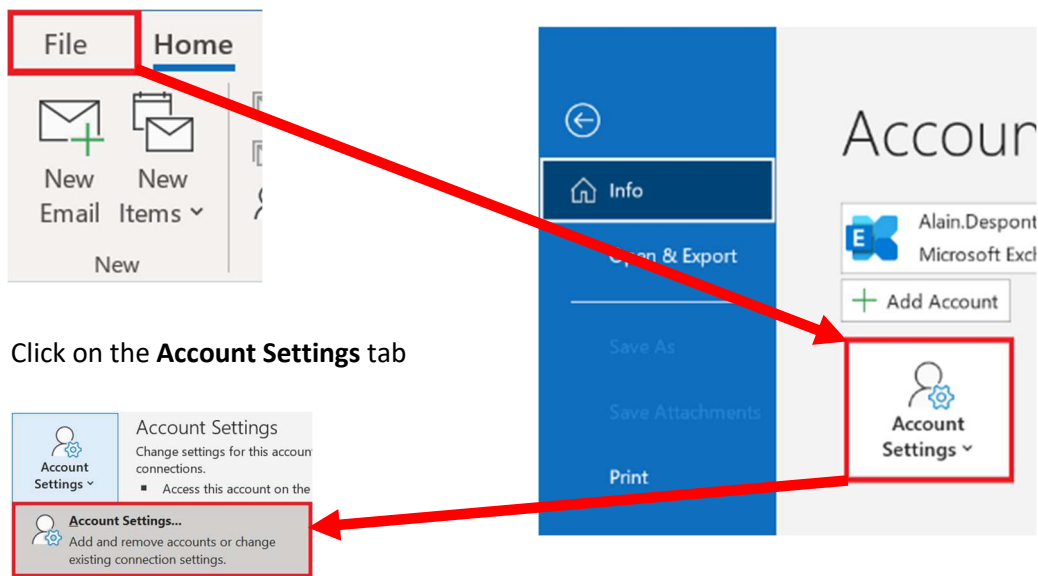
2) Click on the **Account Settings** tab

3) Click on the **Data Files** tab, then **Settings**, then choose the **Advanced tab**.

4) Add the service desk mailboxes
   - Create a new mail and click on FROM – **Other email address**… - Search and add mailboxes here too.

How it works

Macros and macros and macros...

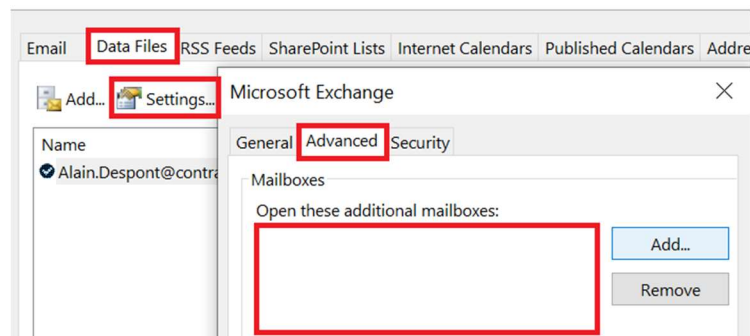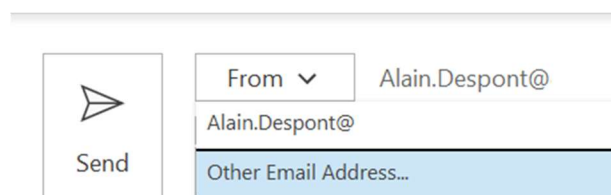In short, macros will read each line and produce an email for you and send it.
Since it checks if the row is empty before stopping, it's a good idea to check no row is empty at all before the end. In simple, there should be one row for each request, with no space between them till the end.

At the end it filters RQT numbers (**always fill RQT even if none**) and produce a list for you to mass update in Service-Now. It updates the date of the latest sending, so you don't have to worry about delays between reminders.

Counter & daily button push

Normal deliveries follow a strict process, which is calculated by a daily counter, for each specific RQI.

As such, you need to use the DAILY Reminders macro every workday.

This ensure every request follow the counter, and mails are sent following the time given for each request.

HINT: If you see the red cross, you can send emails. If it's a green tick, you cannot launch emails.

Not delivered equipment

Request that does fall outside of the period allowed, will be marked in RED.

Simply put the equipment in the red drawer and remove the task from your sheet.
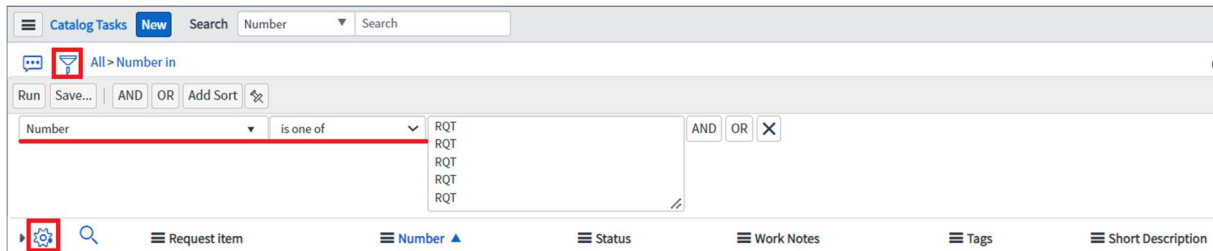Write at the top of delivery sheet / equipment, something like: **NOT DELIVERED**
Asset team will close the task accordingly.

Everyday use procedure (How-To)

Old data verifying and new data input

1. Click on the **Verify RQT** macro which give you **the list of all RQT in the tool**
2. Input this list inside the **MailMerger_RQT** favorite on SNOW.

3. See all RQT that were closed and remove them from the respective sheet using the **Remove RQT** macro or by hand.
4. Input new requests with relevant data for all your tasks using your **OSS Dashboard.**
5. Press relevant macros depending on what you want to send:

Macro explanations

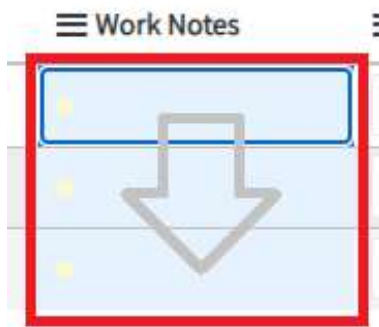|	
AFTER WEEKEND	This is for the Mondays sending it will send days you missed work from latest sending (4 days max).
DAILY	This one sends normal deliveries through the rest of the week.
NEWCOMERS	Send newcomers emails.
RETURNS	In case you have returns to do.
EXIT	When people leave the company.
VERIFY RQT	Give you the RQT inside the merger to check in SNOW if they are still open or had been closed by a colleague
REMOVE RQT	Input the RQT Number to remove lines from the tool
CHECK PAST RQT	If you closed the RQT Report after sending mails, you can find them again
REFORMAT MY SHEET	Replace all formats with default Calibri black 11 and put default conditional formatting in case.
DOCUMENTATION	To access this document if needed.

After sending emails: update RQT in service-now

1. Input the RQT numbers gathered after you sent mails in the **MailMerge_RQT** favorite and click on **RUN.**

2. CTRL + Continuous left click to select all work notes you want to update.

3. Add relevant worknote and save.

Suggestions for updating your RQT

Since it is a good idea to update regularly, you can try this:
For deliveries: *Mailsent*
For returns: *1x, 2x, 3x Mailsent*
For mails pending or not updated this day: *Waiting next sending*

Tips & tricks & known errors

Single mails templates for continuity plan

You can find mails to send one specific mail inside the **01_Single Mails Templates** folder.

Use those templates exclusively if the tool has an issue.
HINT: You can save you email in the template for future use.

Using tags

You can use TAGS to mark your RQT as being inside the MailMerger tool in SNOW.
So you can check fast visually if you have a new task to add to the tool or not.

You can use **IN_MAIL_MERGER**, so you can fast add this tag writing "**IN_MAIL…**" once you wrote the data inside the mail merger.
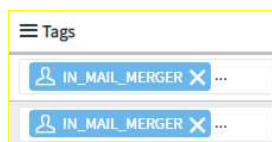
Other hardware

You can use the reminders sheets for hardware too.

Simply put MOUSE/HEADSET or whatever hardware as CI, remove the model and voila, IT hardware reminders can be sent as well if needed.

Days	CI	Model	RQI	RQT	Username
0	HEADSET		RQI00000000	RQT00000000	Despont, Alain
0	PMICHLAUL000000	DEVICEMODEL0	RQI00000000	RQT00000000	Despont, Alain
0	DOCKING STATION		RQI00000000	RQT00000000	Despont, Alain

Other hardware for returns & Exits

Use the CI column for hardware, not the model column.

Known errors

All known errors were resolved.

Automated Solutions

For whom?

This is not for standard technicians unless required by your duties.

Automating SNOW

My method of automating snow is unreliable because it uses the SENDKEYS technique to move on the browser. It is subject to failure du to network latency, and we cannot do something else while the script run (it imitate user interaction).

Automated returns: Namelist

Into **02_AutomatedSolutions/ AutomatedReturns** folder you will find **AutomatedReturns_NAMELIST.csv**
Add the names of the users (extracted from service-now) from which you want to recover IT equipment, one user per line.

Should look like this:

    Name
    Despont, Alain

Take note you can have issue depending of the localization of the computer which make .csv not behave the same way.

Automated returns: Service-now extraction

Once names are added, execute **AutomatedReturns_RUN.bat**
Let the script check online in the SNOW report to extract all needed data for all users in the list.

DON'T DO ANYTHING WHILE THE SCRIPT RUN

Once finished, take all the **.csv** sheets from your DOWNLOADS folder, and move them inside **02_AutomatedReturns\csv**

Automated returns: Combining CSV

Inside **02_AutomatedReturns\csv**

- Execute **01_CombineReturnList.bat**, this produce **03_CombineReturnList.csv**
- Execute **02_CleanDataForMails.bat**, this produce **03_CleanDataForMails.csv**

Automated returns: Return sheet

Add data from **03_CleanDataForMails.csv** inside the Mail Merger by simple copy (columns are already cleaned and data ready to be used.

Add mailsent value to 0 for first emails sents to users.

Mail Merger process

Delivery Process

Delivery is based on the number of days a request stay open, and the delay between reminders.

- RemindersMaximum (21) +2
- RemindersDelay (3)

If RemindersMaximum is 21 and RemindersDelay is 3, user will receive a maximum (Division) of 7 reminders in total. Since request close at 21, we won't send a reminder the last day, and since the last sending can happen a weekend, we give two more days to users.

The tool will calculate all possible multiple from this base number like this :
If RemindersDelay = 2, sendings will happen the 0, 2, 4, 6…
If RemindersDelay = 5, sending will happen the 0, 5, 10, 15, until the maximum days allowed for a request to live.
The tool will compare the counter from the sheet (Days) to see if it needs to send email or not.
Subject of the mail will show the number (1/7 or 2/7 etc…)

For pending deliveries a bit of jump is made from -1 to 1 because of the way calculation is done, so it does not send a mail twice.

Newcomer process

Newcomers are unable to receive email since they don't have equipment.

- Newcomer emails are sent to supervisor.
- Send email every **xDays** a week till the newcomer come pick it up.
  - * xDays can be changed inside __DATA__ to impeach techs to over send.

Returns process

No mail will be sent if any user is a VIP in the sheet.

In the sheet put **FALSE** or **TRUE** for being a VIP or not, for users and supervisors.
Replace manually VIP user with their assistant **BUT also be sure it is not a SMT Assistant**.
No CC mails will be sent if supervisor is a VIP, so it's not mandatory to change this cell, but you can empty it if needed.

Request assistance from management for any returns related to SMT and SMT Assistants.

xDays	Email to user
xDaysx2	Email to user + Supervisor (except VIPs)
xDaysx3	Email to user + Supervisor + Management
	No more emails sent after 3 mails, even if still in the list
	* xDays can be changed inside __DATA__

Technical documentation

Named cells and their uses

Name	Type	Reason
AssetManagementEmail1	Email	Management: receive copies for returns of IT equipment
AssetManagementEmail2	Email	Management: receive copies for returns after 3+ reminders
DateCheckNewcomers	Date	Date of the latest sendings
DateCheckReminders	Date	Date of the latest sendings
DateCheckReturns	Date	Date of the latest sendings
FullBCC	TEXTJOIN	Asset emails, Management POC email, Technician email *This is for returns tracking*
Mailsent	Number	Check the numbers of mailsents (temp)
MailsentBCC	TEXTJOIN	Asset emails, Management POC email, Technician email + Management escalation POC email *This is for returns escalation after three mails*
NewcomersDelay	Number	Days between mail sendings
RemindersDelay	Number	Days between mail sendings
RemindersMaximum	Number	Live of a request in days
ReturnsDelay	Number	Days between mail sendings
ReturnsSubject	Text	Subject of the mail
ServiceDeskCity	Text	City of the service desk
ServiceDeskEmail	IF(A=;else)	Emails of the service desk (two possible)
ServiceDeskLocation	Text	Building of the service desk
ServiceDeskName	Text	How is named the service desk inside the company
ServiceDeskPhone	IF(A=;else)	Phones of the service desk (two possible)
SupervisorName	Text	Used to find send exit emails which combine all rows with the same supervisor
TechBCC		Service desk, Technician email. *This is for deliveries and newcomers tracking*
TechnicianEmail	Email	The technician own email
VIPCheck	COUNTIF	If 1, there is a VIP in returns sheet, shutdown the macro
VIPSupervisorCheck	COUNTIF	If 1, no CC mail to supervisor for returns

Name	Refers To	Scope
AssetManagementEmail1	=__DATA__!$B$15	Workbook
AssetManagementEmail2	=__DATA__!$B$16	Workbook
DateCheckNewcomers	=__DATA__!$B$30	Workbook
DateCheckReminders	=__DATA__!$B$29	Workbook
DateCheckReturns	=__DATA__!$B$31	Workbook
FullBCC	=__DATA__!$B$12	Workbook
MailSent	=__DATA__!$B$25	Workbook
MailSentBCC	=__DATA__!$B$13	Workbook
NewcomersDelay	=__DATA__!$B$21	Workbook
RemindersDelay	=__DATA__!$B$19	Workbook
RemindersMaximum	=__DATA__!$B$20	Workbook
ReturnsDelay	=__DATA__!$B$22	Workbook
ReturnSubject	=__DATA__!$B$17	Workbook
ServiceDeskCity	=__DATA__!$A$2	Workbook
ServiceDeskEmail	=__DATA__!$B$7	Workbook
ServiceDeskLocation	=__DATA__!$B$2	Workbook
ServiceDeskName	=__DATA__!$B$6	Workbook
ServiceDeskPhone	=__DATA__!$B$8	Workbook
SupervisorName	=__DATA__!$B$24	Workbook
TechBCC	=__DATA__!$B$10	Workbook
TechnicianEmail	=__DATA__!$C$2	Workbook
VIPCheck	=__DATA__!$B$26	Workbook
VIPSupervisorCheck	=__DATA__!$B$27	Workbook

Visual date check

For reminders (Daily check)

=IF(__DATA__!B27 = TODAY(); "✔"; "✗")

For newcomers (Twice per week)

=IF(__DATA__!B28 >= TODAY()-NewcomersDelay; "✔"; "✗")

For returns (Weekly check)

=IF(__DATA__!B29 >= TODAY()-ReturnsDelay; "✔"; "✗")

For exits
No visual check

Conditional Formatting

Conditional Format is applied directly at the start of the MailMerger file and will make sure text is the same color and size everywhere.

It's part of the code that make sure every sheet is protected/unlock where needed.

Check **Function_RemoveProtection if needed.**

Changelog

Changes 2021

September 21	First all-in one sheet for mails created
October 21	Basic macros to send mails
19.11.21	Templates redone for every interact for tool deployment
22.11.21	**First package ready to install**
24.11.21	Readme and configuration check
25.11.21	Polishing installation /uninstall via batch **Added to GitHub**
11.12.21	Newcomers sheet and macro **RQTBulkupdate macro** Mailsent count for CC to management
13.12.21	Documentation name change BCC to management for returns
16.12.21	Documentation updated RQTBulkupdate macro corrected
24.12.21	Added technical documentation Added Process documentation Added Automated returns documentation
25.12.21	**.ppt to .docx documentation migration** Basic weekend & bridgeday macro
26.12.21	**Visual check for when to send mails** RQT Update after macro use rather than at will.
31.12.21	**Check if mail were sent and disable macro** Corrected returns RQT not showing Doc update

Changes 2022

01.01.22	**Removed all formulas – replaced by macro calculation now able to move rows by hand** Conditional formatting enhancement
08.01.22	**Performance migration -> Copied everything to new excel file.** Added EXIT mails, reworked RQT list, added Verify RQI macro, corrected documentation
10.01.22	Corrected exit email subject Modified documentation with last changes
23.01.22	New city asset email added Exits are now like returns, changed explanation for returns. **Now able to change delay for reminders, tool will automatically adapt to new values without rewriting code.**
01.02.22	Correcting documentation due to first feedback. Missing Protection function on Weekends macro
03.02.22	Template correction Documentation cleaning + adding how to add alternate mailboxes Scenario to understand the logic
07.02.22	**Added REMOVE RQT macro which delete line and add new line at bottom**
12.02.22	Template metadata with personal mail removed. Verfiy RQI become verify RQT since RQI can still be opened, while RQT is closed.
17.02.22	**Redone RQT extraction list after mail, it's printed to text as soon as mail is sent.** Redone DELETE RQT, is now completely reliable.
21.02.22	**Verify RQT now print to text and no more using filters.** Rewritten some parts of doc.
01.03.22	Return to delivery sheet after deleting an RQT and show again prompt to delete. Return to exit sheet after exit macro use
07.03.22	Corrected .CC not being empty with reminders
09.03.22	**Business names cleaning and first public version**