AccessAble Help Desk 2012

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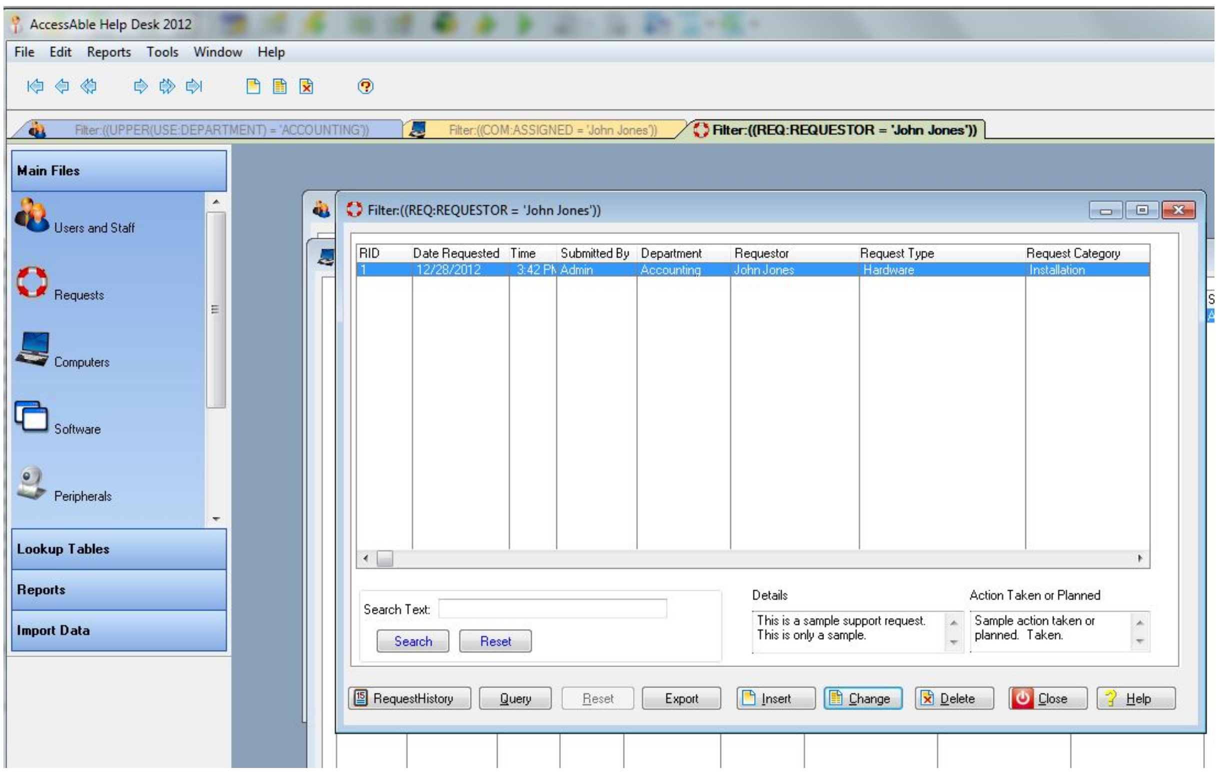
1 Introduction

1.1 Welcome

AccessAble Help Desk 2012 is a combination of a desktop application designed to run on Microsoft Windows (I have tested on Windows XP, Vista, Windows 7 and Windows 8)
and a browser based application (I have tested on Internet Explorer, Safari, FireFox and Chrome) with mobile web pages (I have tested on Iphone, Android and Blackberry) for managing an IT Help Desk. The program allows you to manage requests for support, inventory of computer, peripherals and software and a knowledge base.



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NOTE: I use and recommend a number of Microsoft Products but do not resell software or licenses for them or any other company at this time.

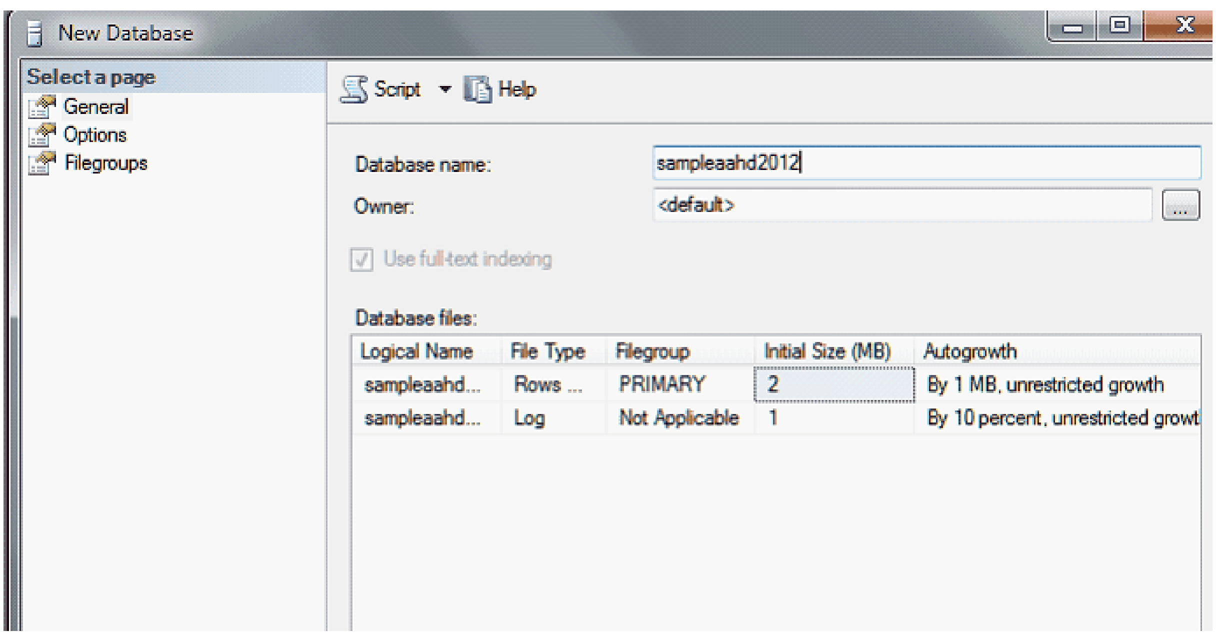
1.2 Installation

First, Get a Database

I like the old joke from Comedian Steve Martin: "How to make a million dollars: First, get a million dollars... ". In the case of the AccessAble Help Desk 2012 desktop application for

Microsoft Windows and browser based web pages, you will need to first, get a database. Actually you first need a database *server* running Microsoft SQL Server 2005, or higher. I have a number of web hosting providers I use and that may be an economical way for many small businesses. Just be sure that when you get an account it is with a provider like Winhost.com that provides web hosting for .NET web pages and a Microsoft SQL Server database. They will provide a control panel that let's you create databases but you may also want to download Microsoft's SQL Server Management Studio express edition to be able to easily run the script I provide that will create the tables and fields in the database. If your organization is like many medium and large companies you may already have licensed MSSQL Server from Microsoft) and just need to get your database administrator to run the script for you. (I don't currently sell any Microsoft products or services, if you need to purchase licenses for Microsoft SQL Server I recommend you visit http://www.microsoft.com or visit a reseller's web site) Either way, read on…
I don't recommend making any changes to the structure of the tables. The database structure as provided in the SQL script is compiled in the windows based executable program for AccessAble Help Desk 2012. I mentioned the script to create the tables and indices and so on. You will need to run this script after creating a database – either on a hosted server such as provided my Winhost.com or a database on a server your company already has for your purposes. Either way, select the database in SSMS (SQL Server Management Studio) or similar tool and open the SQL script file.

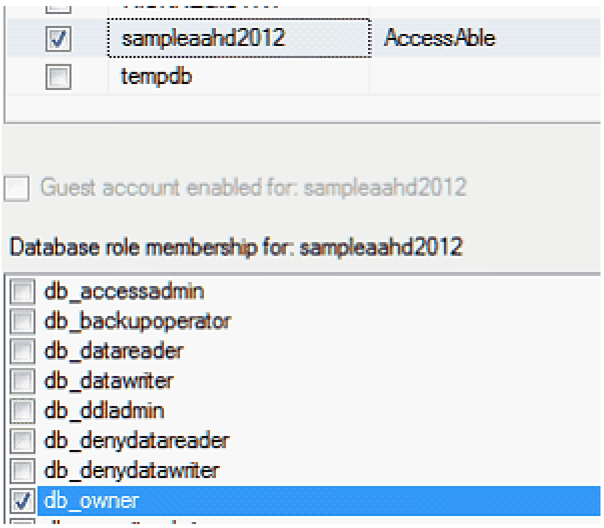
In the next screen shot I am creating a new database. Depending on your situation, the database may have already been created and a user name and password provided to you. However, if you are installing the program yourself, perhaps using Microsoft SQL Express, you may have to create the database.



You own it – the database that is...

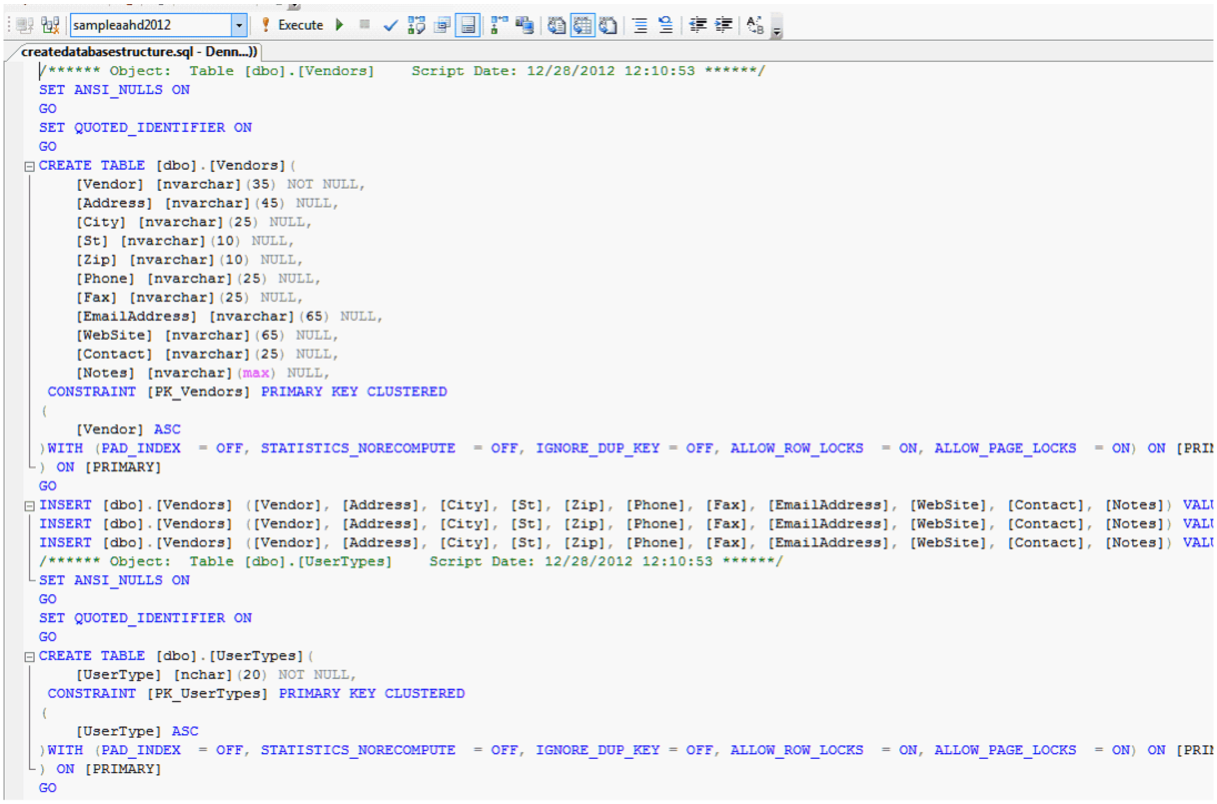
If creating a login for the database you may want to be sure the login has the role db_owner. If using a hosting provider they may provide you a login name that is likely already db_owner equivalent.

You may also need to create a Microsoft SQL Server Login mapped to the database you created. See below.



In this example I named the account "AccessAble" and have assigned the db_owner role to the account. That is really all you have to do before you can run the provided script to create the table structure.

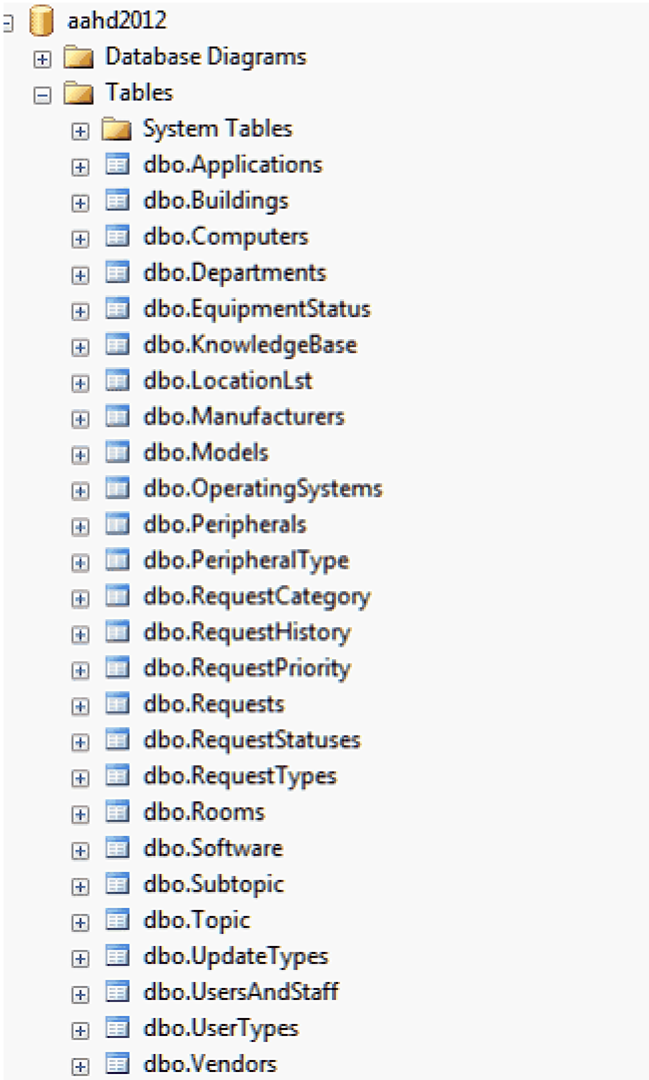
Now I have created the database. I choose the File Open menu option and browse to the .sql script (createdatabasestructure.sql). When I have it loaded, and have my new database selected, I click the Execute button to run the script.



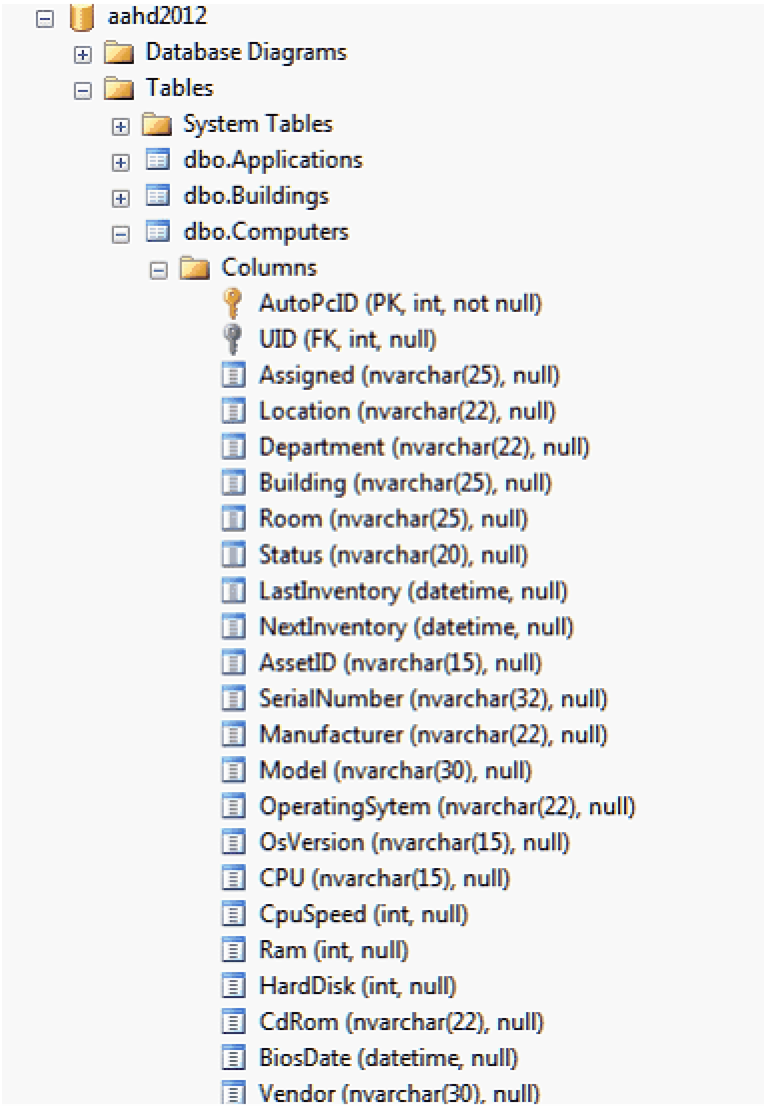

```
/****** Object:  Table [dbo].[Vendors]    Script Date: 12/28/2012 12:10:53 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
CREATE TABLE [dbo].[Vendors](
    [Vendor] [nvarchar](35) NOT NULL,
    [Address] [nvarchar](45) NULL,
    [City] [nvarchar](25) NULL,
    [St] [nvarchar](10) NULL,
    [Zip] [nvarchar](10) NULL,
    [Phone] [nvarchar](25) NULL,
    [Fax] [nvarchar](25) NULL,
    [EmailAddress] [nvarchar](65) NULL,
    [WebSite] [nvarchar](65) NULL,
    [Contact] [nvarchar](25) NULL,
    [Notes] [nvarchar](max) NULL,
 CONSTRAINT [PK_Vendors] PRIMARY KEY CLUSTERED
(
    [Vendor] ASC
)WITH (PAD_INDEX  = OFF, STATISTICS_NORECOMPUTE  = OFF, IGNORE_DUP_KEY = OFF, ALLOW_ROW_LOCKS  = ON, ALLOW_PAGE_LOCKS  = ON) ON [PRI
) ON [PRIMARY]
GO
INSERT [dbo].[Vendors] ([Vendor], [Address], [City], [St], [Zip], [Phone], [Fax], [EmailAddress], [WebSite], [Contact], [Notes]) VALU
INSERT [dbo].[Vendors] ([Vendor], [Address], [City], [St], [Zip], [Phone], [Fax], [EmailAddress], [WebSite], [Contact], [Notes]) VALU
INSERT [dbo].[Vendors] ([Vendor], [Address], [City], [St], [Zip], [Phone], [Fax], [EmailAddress], [WebSite], [Contact], [Notes]) VALU
/****** Object:  Table [dbo].[UserTypes]    Script Date: 12/28/2012 12:10:53 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
CREATE TABLE [dbo].[UserTypes](
    [UserType] [nchar](20) NOT NULL,
 CONSTRAINT [PK_UserTypes] PRIMARY KEY CLUSTERED
(
    [UserType] ASC
)WITH (PAD_INDEX  = OFF, STATISTICS_NORECOMPUTE  = OFF, IGNORE_DUP_KEY = OFF, ALLOW_ROW_LOCKS  = ON, ALLOW_PAGE_LOCKS  = ON) ON [PRI
) ON [PRIMARY]
GO
```

I have provided some sample data that will be created when you run the script. You will want to edit the data, maybe starting with the Lookup Tables to customize the program for your purposes.

The screen below shows the tables created when you run the script to create the tables. If you run the script but don't see these tables when you select your database (this one is named aahd2012) you may need to right click on the tables tree and choose refresh.

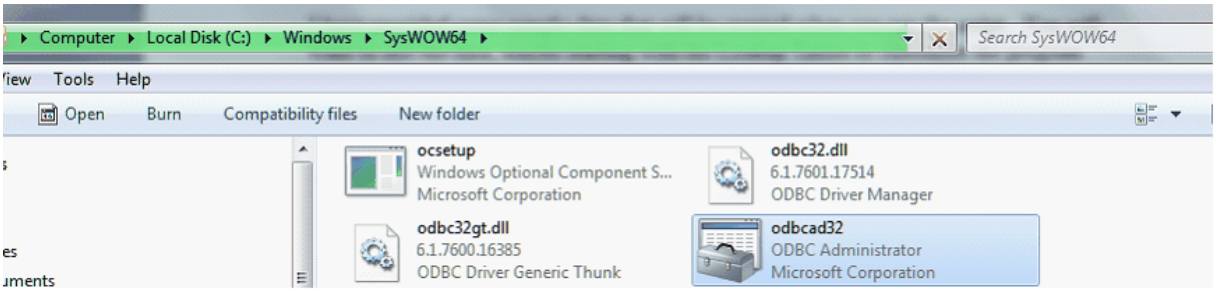


The next screen just shows part of the structure of the computers table. You can see the Primary and Foreign Keys for this table.

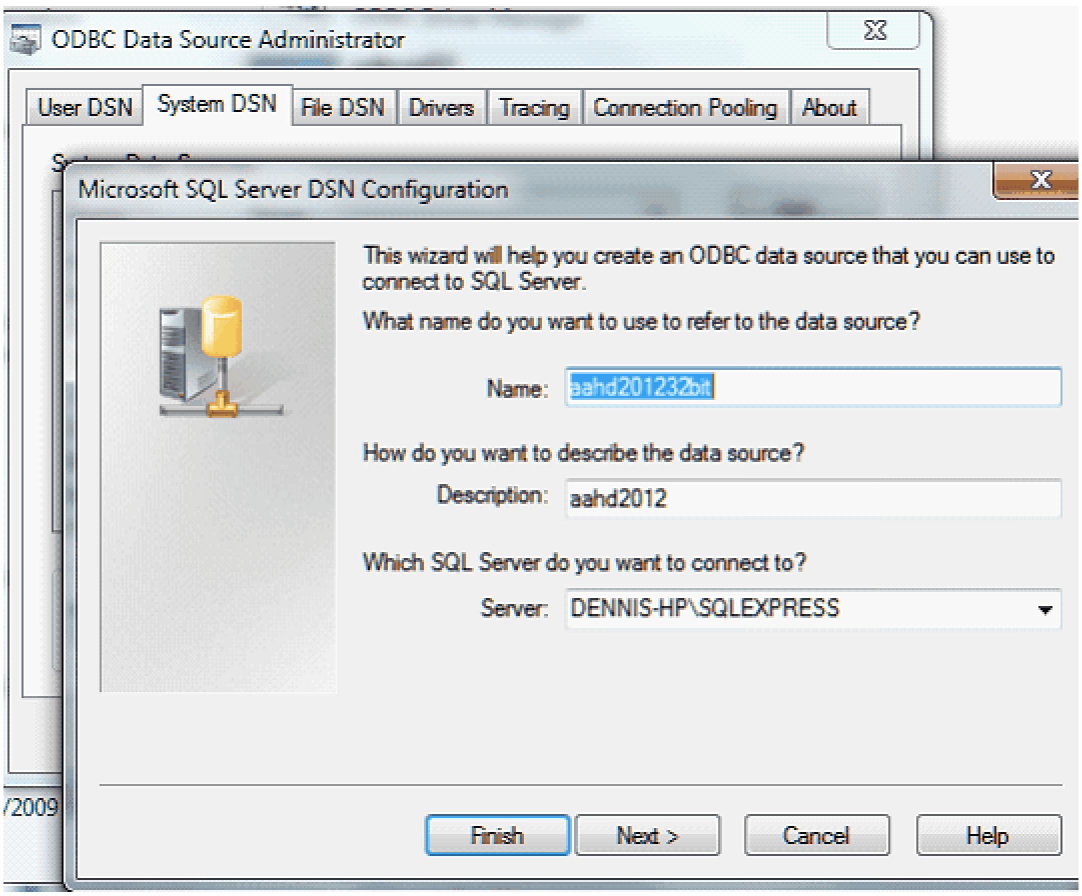


SET UP THE ODBC Connection – name must be "aahd201232bit"

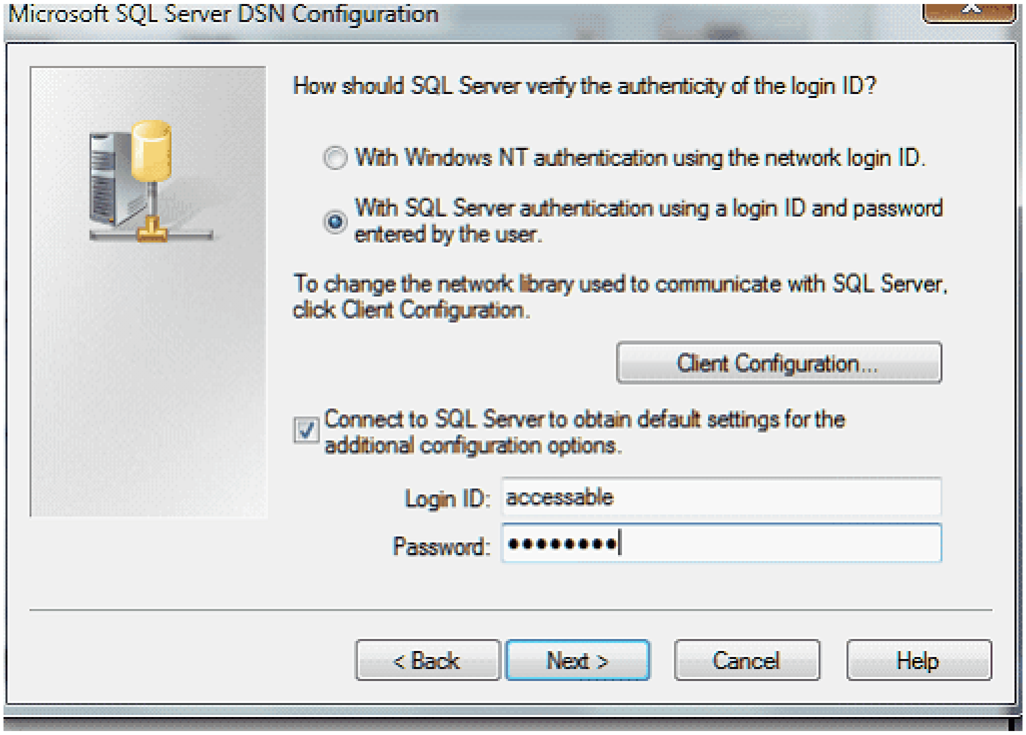
Now that the database and tables have been created, you will be able to set up your ODBC connection that is used by the windows desktop application to connect to the database. AccessAble Help Desk 2012 has been created with backward compatibility in mind. This means that you can use the program whether you have Microsoft SQL Server 2005 – or 2008 or 2012. The script to create the tables was set to be compatible back to MSSQL 2005. Many will run the desktop application on a 64 bit version of Windows while other may use only a 32 bit version of Windows. If you are installing on a 32 bit version of Windows you will find the ODBC (Open Database Connectivity) applet in the Control Panel. However, if you are using a 64 bit version you will instead have to run the odbcad32 applet which may be found in c:\windows\syswow64 folder.



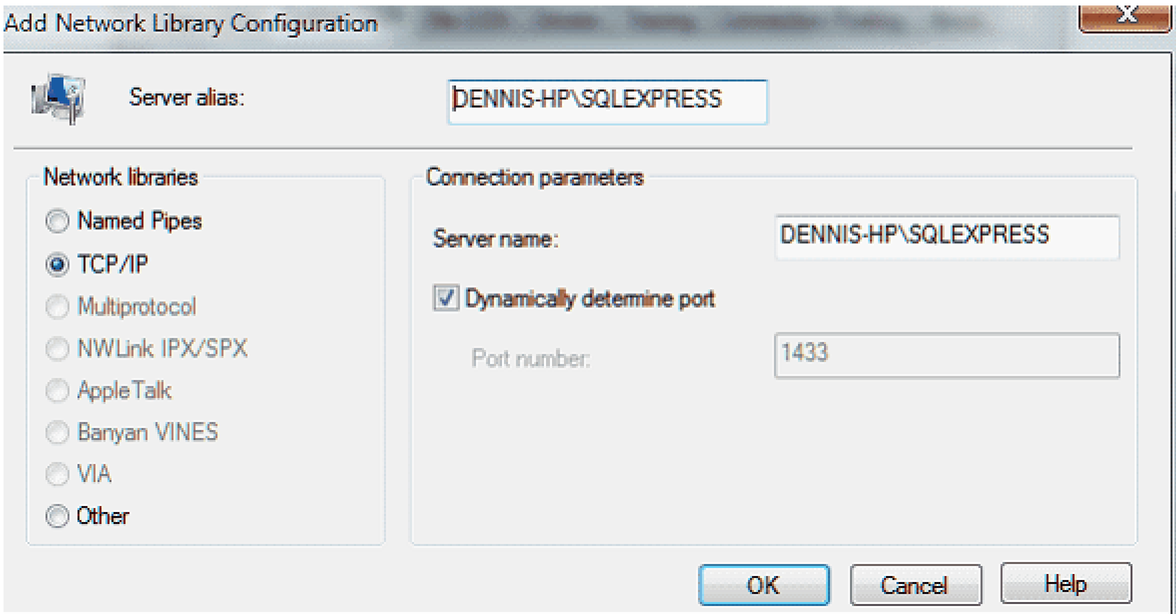
See the screen below. You will first need to fill in the name of the MSSQL Database Server – you may need to include the server name (or IP address) and a \Instance. However, the \Instance may not be required.



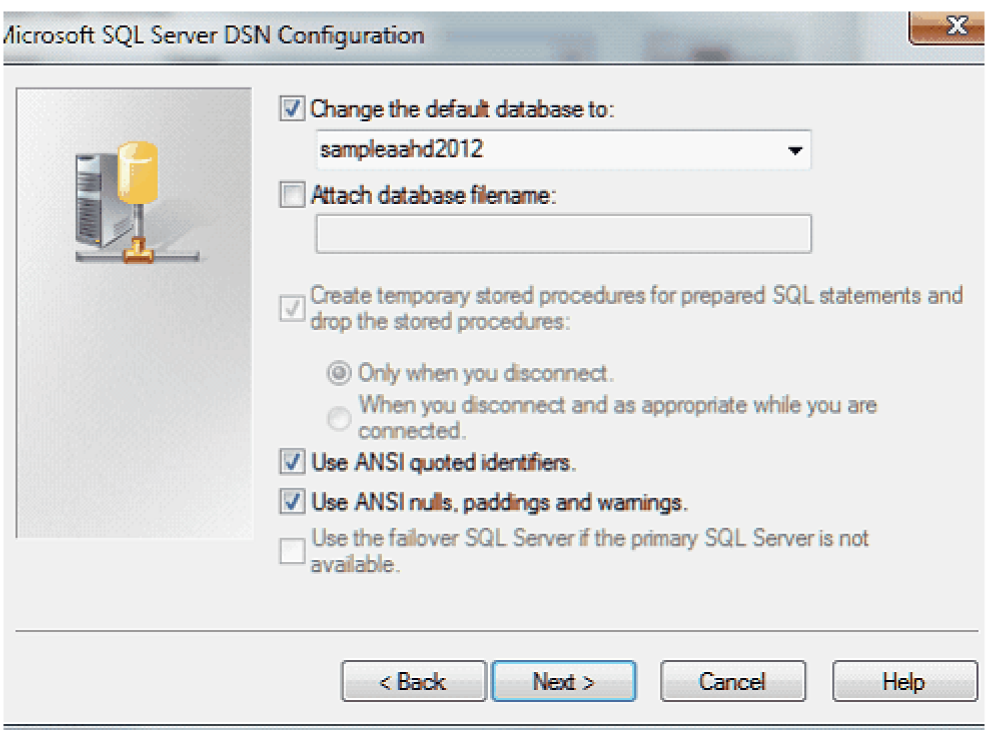
There are two ways of connecting to a Microsoft SQL Server database. 1) Windows Authentication. This means you are logging in to the server with the same credentials you use to login to the network. This will not work for a database hosted by an Internet Service Provider, such as Winhost.com – in which case you will be using method 2) SQL Server Authentication. You will need to remember which method you are using for the ODBC DSN connection. The web interface for AccessAble Help Desk 2012 uses the same type of information in the web.config file which is used for the database connection on the web pages. Your user logins to the web server are in a separate table (the Users and Staff table) not the SQL Server logins which we are talking about here. Anyway, the next screen shows the ODBC connection using the AccessAble login we created in MS SQL Server.

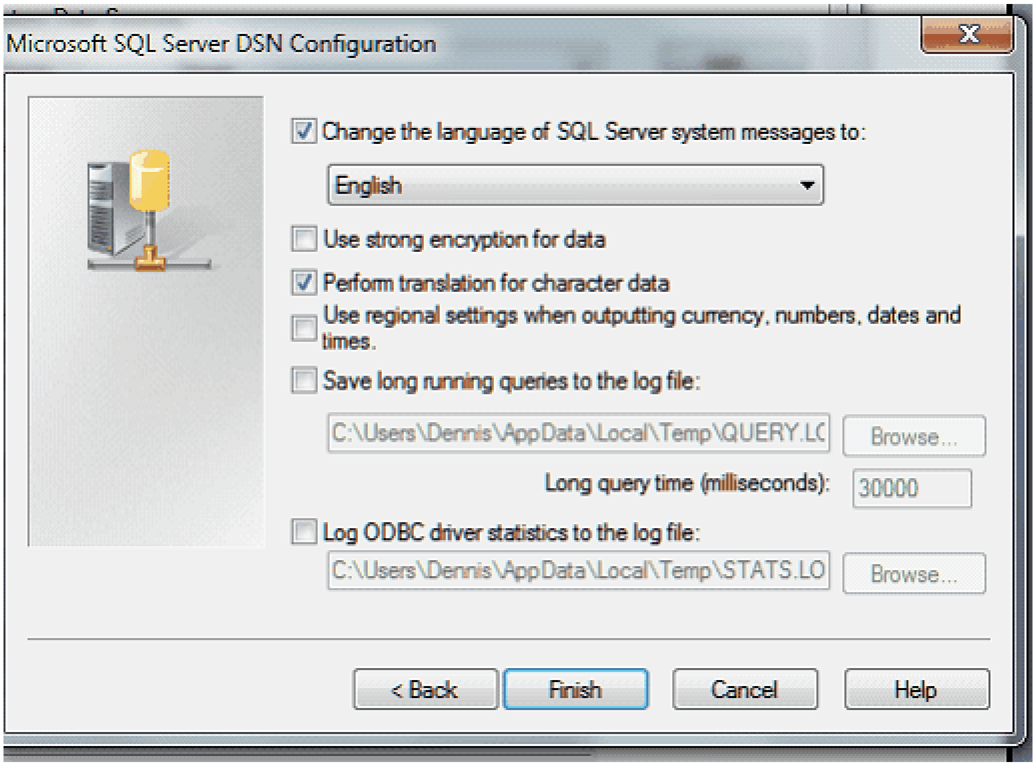


Client Configuration – in most cases the default check box can be used, if needed you can uncheck the box and manually enter a Port for the SQL Server connection.

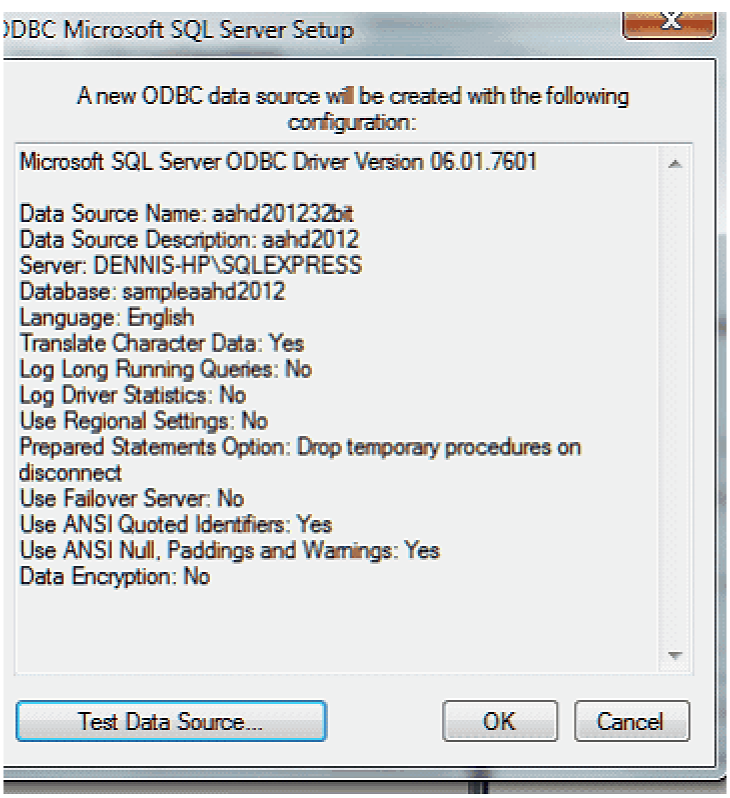


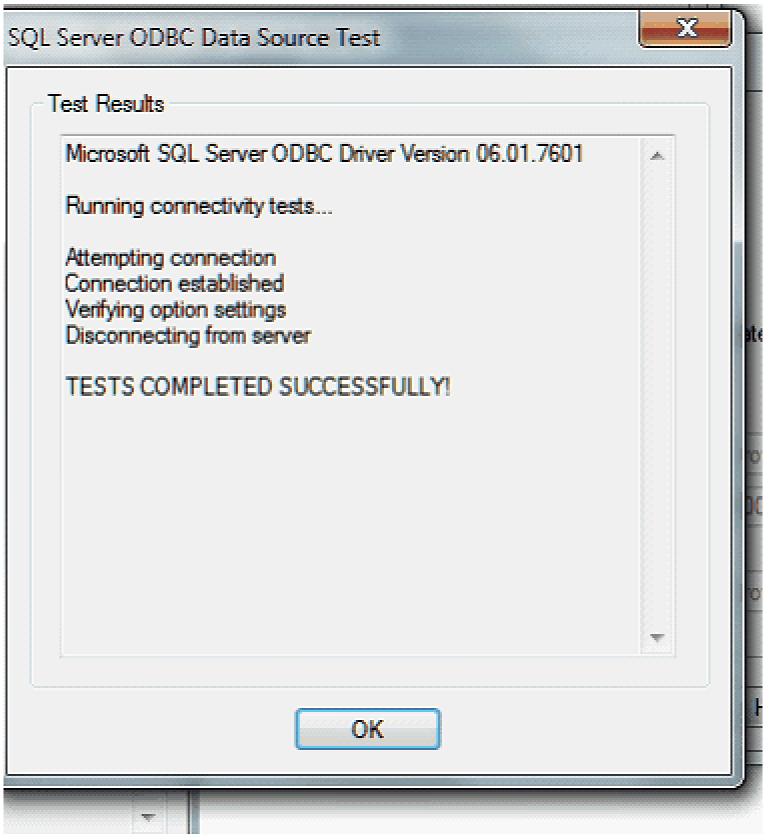
Next choose the database to connect to – in our case sampleaahd2012





Finally, click Finish and test the setup.



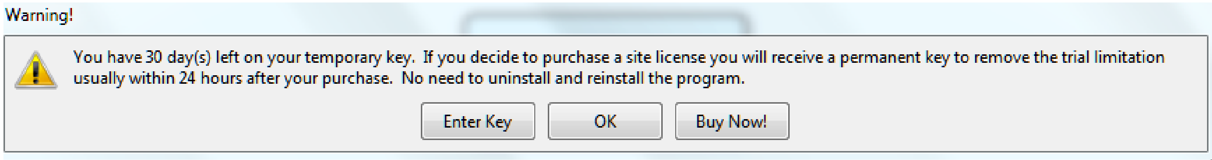


After creating the database and running the script to create the tables, you can run the Setup to install the Microsoft Windows based AccessAbleHD.exe program you can use the Shortcut to run the program.

In order for you to evaluate AccessAble Help Desk 2012 to see if it meets your needs, the program automatically issues you a temporary "key" to allow you to try the program for up to 30 days. When you first launch the program you will see a message like below. There are 3 buttons. The first button is used if you have decided to buy a site license, placed an order with BMT Micro and received your Permanent Key. NOTE: When placing your order you will prompted for a "Register To: " value. This can be an individual's name or organization name. Whichever you use, you will need to enter that along with the Registration Key from BMT Micro to remove the 30 day trial limitation. Since AAHD 2012 is sold as a site license, you may enter the same register to name and registration key on as many computers in your company as you like to remove the 30 day trial limitation. Registration information is stored in the windows registry on each computer.

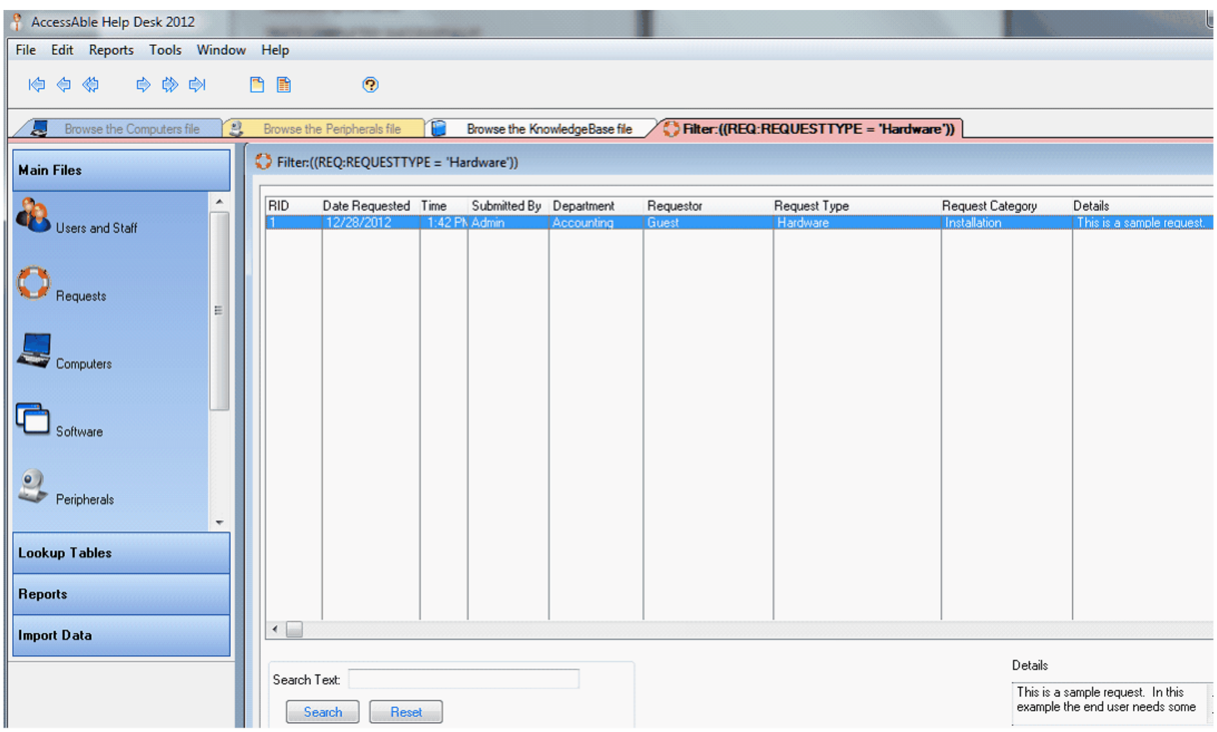
The middle button labeled OK is what you will click while you are evaluating the program.

Finally, a Buy Now button will take you to a registration page where you can purchase your site license through BMT Micro. The site license price is currently $549 - discount codes may be available. Check with me by emailing dbandsons@aol.com



Now when we launch the program we will see a screen like below. Enter the password and press enter (if using Windows authentication you can instead click the Use Trusted Connection check box and click OK).

If all went as expected you will then see a screen like the one below:

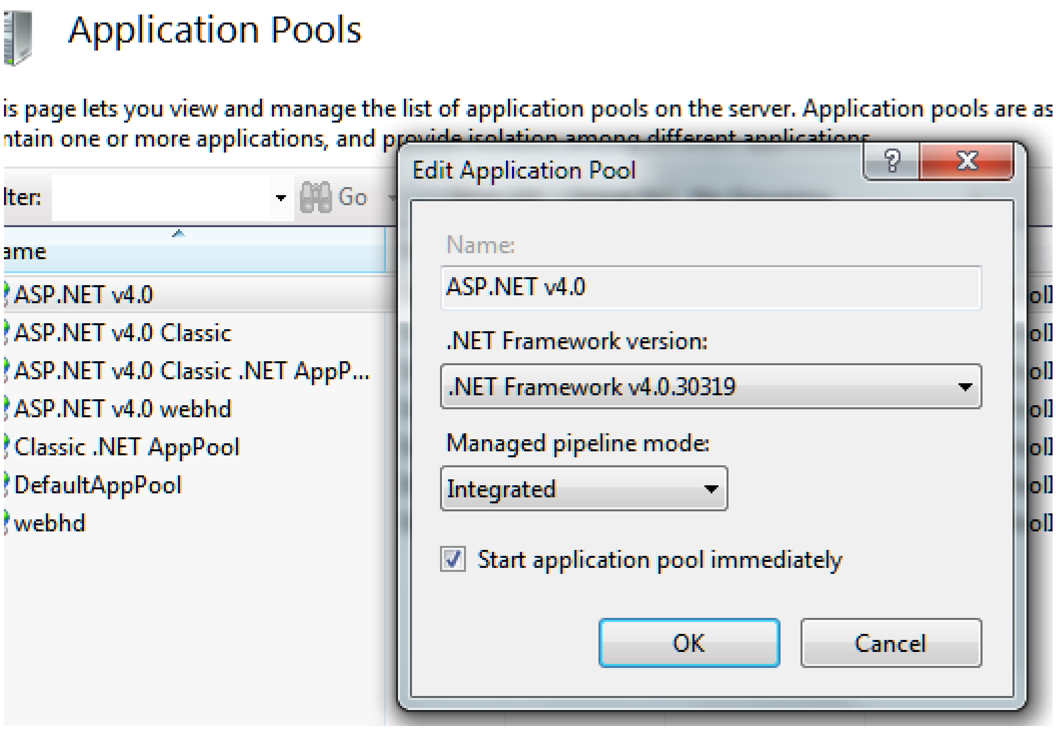


Before showing more screens from the desktop application, let's talk about the web interface. I have provided a setup/installation program for the desktop application. The windows application can be run from any Microsoft Windows based computer that can connect to the Microsoft SQL Server. In fact you can install Microsoft's SQL Server Express Edition on the same computer as the windows application if you want, but in most cases you will be connecting to a "real" server that has the database installed from your desktop or laptop computer where you installed the windows application.

Web Server Installation/Configuration

It is even possible that you can run Microsoft IIS on the same computer where you have the database and desktop application installed. NOTE: If you want you can test it all that way but not best for real world usage. Again, to my example of using Winhost.com as the host for your database and web pages the best way to set up the web pages is to extract or unzip the files provided on your computer then modify the web.config file and upload the files using FTP (File Transfer Protocol) to your web server and set the folder us as an Application folder or staring point. This is similar to a virtual web directory for those of you that are used to the older classic .asp web sites.

You will need to be sure the Application Pool is set up correctly - see screen shot.

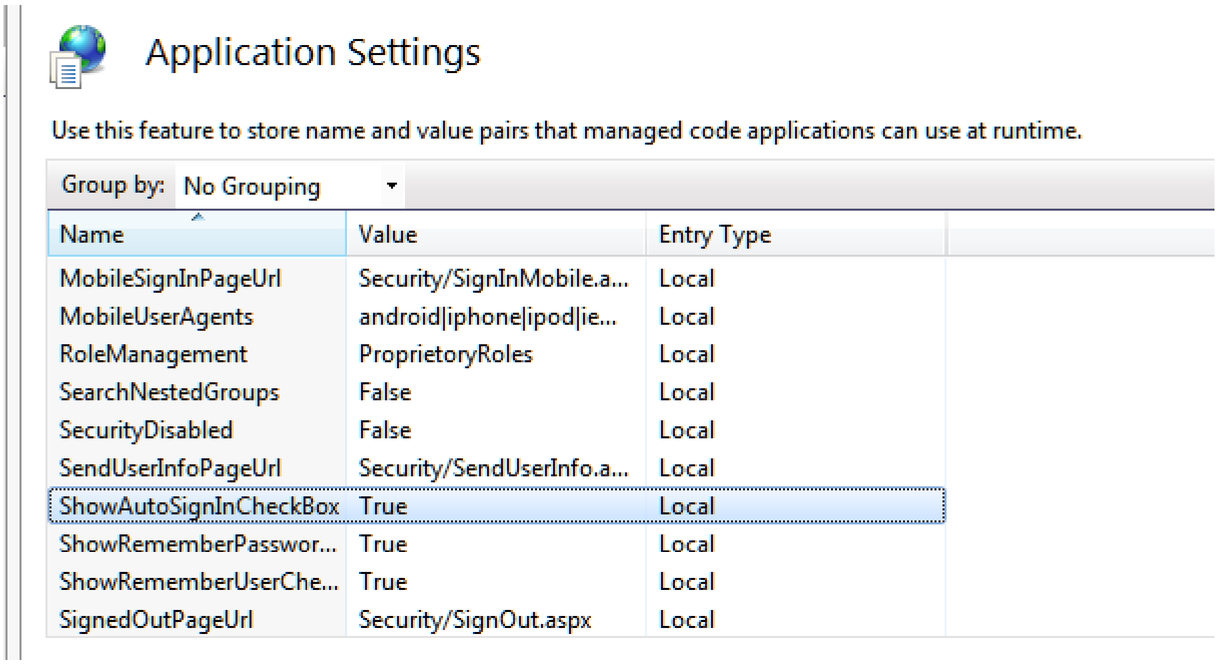


Below is a sample of the web.config that you will need to edit with your information in order for the web pages to connect to the database.

"Data Source=yourservername;Database=sampleaahd12;Trusted_Connection=no;User

Id=AccessAble;Password=yourpassword"

Other changes you will want to make in the web.config file include your mail server settings. If you do not want to show the Remember User Name, Remember Password or Login Automatically check boxes you can set those values to false in the web.config file. NOTE: You can also change the check box display values from within Microsoft IIS. See the screen shot.



The web interface provides a variety of different styles which you can select from a drop down list, however, you may also edit the base classes cascading style sheet to do such things as change the alignment, color and font of field labels, row heading and so on. The web pages are not compiled into .dll files so licensed users of AccessAble Help Desk 2012 will be able to customize much of the web application by themselves. However, for organization that want to purchase customizations of AccessAble Help Desk 2012 (or a completely customized web application for special purposes) contact me at dbandsons@aol.com for information).

The web interface also includes a number of pages that are formatted for mobile phones. Nothing special needs to be done to enable these web pages. The web application will detect the device being used to access the web pages and if a mobile user agent is detected, mobile web pages will be served.

Just as the web interface is not included with the download for the windows desktop application, an installation for the standalone end user report designer is also provided to licensed users only after they have purchased a license. Think of it as another bonus of owning a license for the AccessAble Help Desk 2012. I will email download links for the web interface and report designer after I receive notification of your order from BMT Micro.

Back to the desktop application and some screen shots.

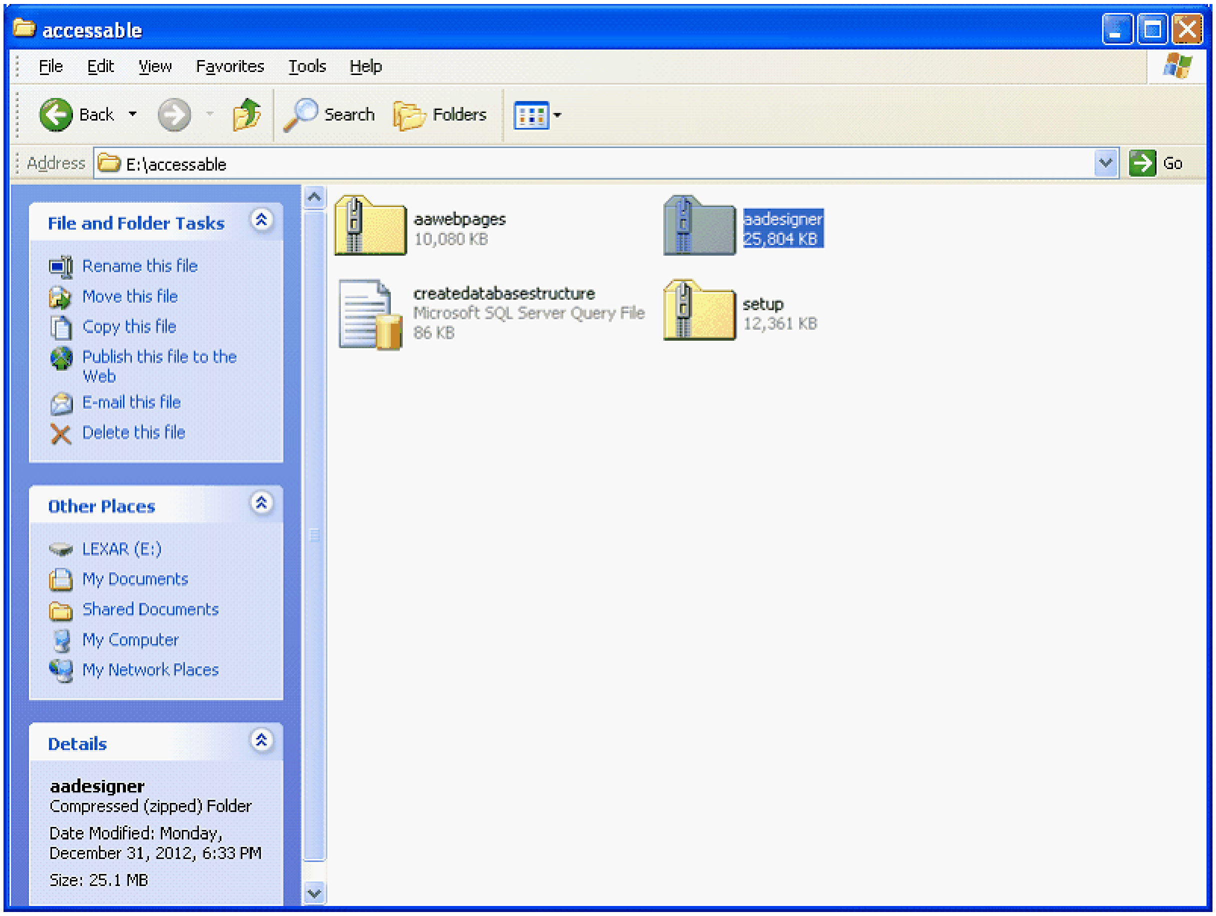
1.3 Installation Example - Windows XP and MSSQL 2005

Breaking the installation of the windows desktop based application down in to steps:

1.) Create a database on your internal or hosted server.
2.) Run the provided script to create the tables, indexes and so on. This script *.sql file is included in the .zip file.
3.) Setup the 32 bit ODBC (Open Database Connectivity) data source (you may need to create a new MSSQL User Login for this step).
4.) Run the Setup from the .zip file.

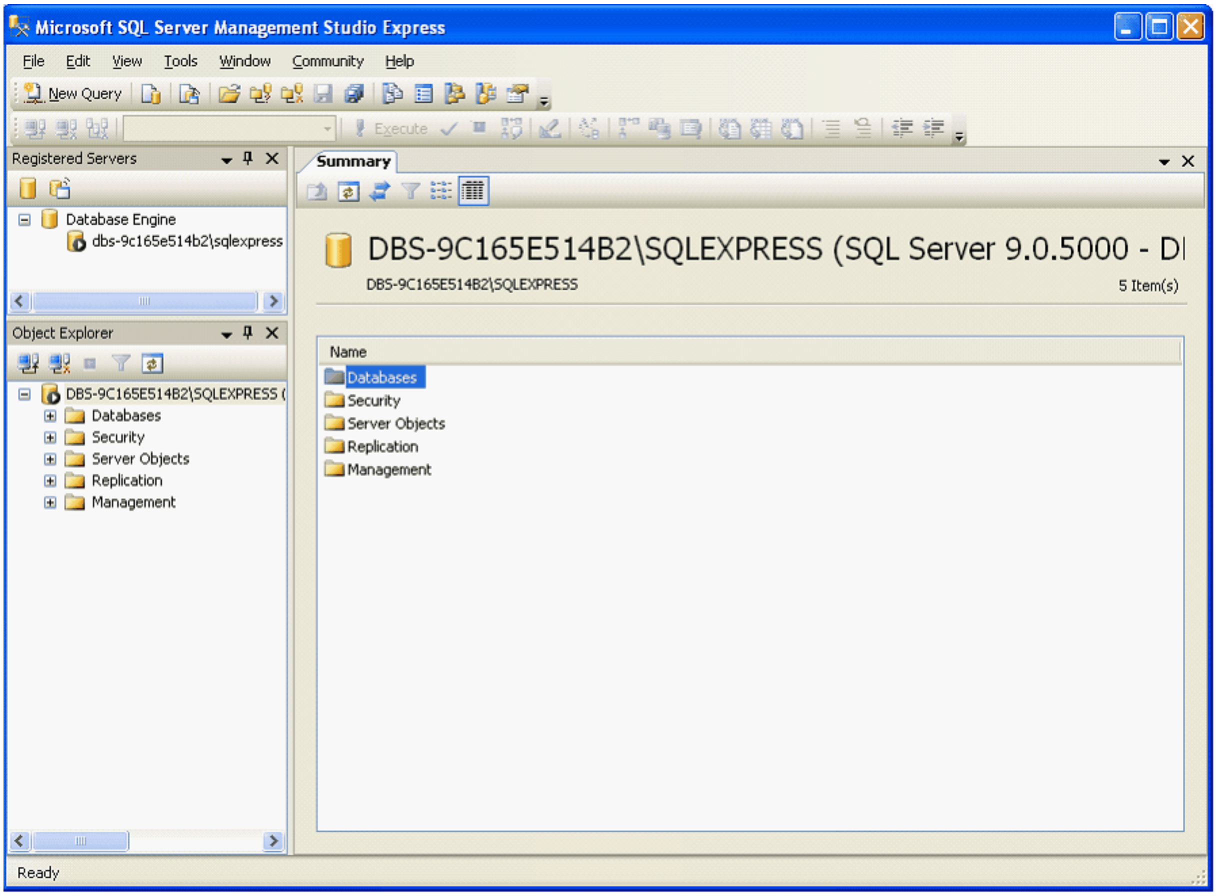
Try the program and if you have any problems or questions email dbandsons@aol.com with AccessAble Help Desk 2012 in the Subject.

If after trying the program you decide you want to keep using it beyond the 30 day trial period order your site license (visit http://www.dbandsons.com for more information and ordering link. The site license covers as many users at your location as want to install the desktop application at your location. As a thank you for ordering the site license you will then be sent download links for the web based interface for the AccessAble Help Desk 2012 with mobile pages and the standalone end user report designer.

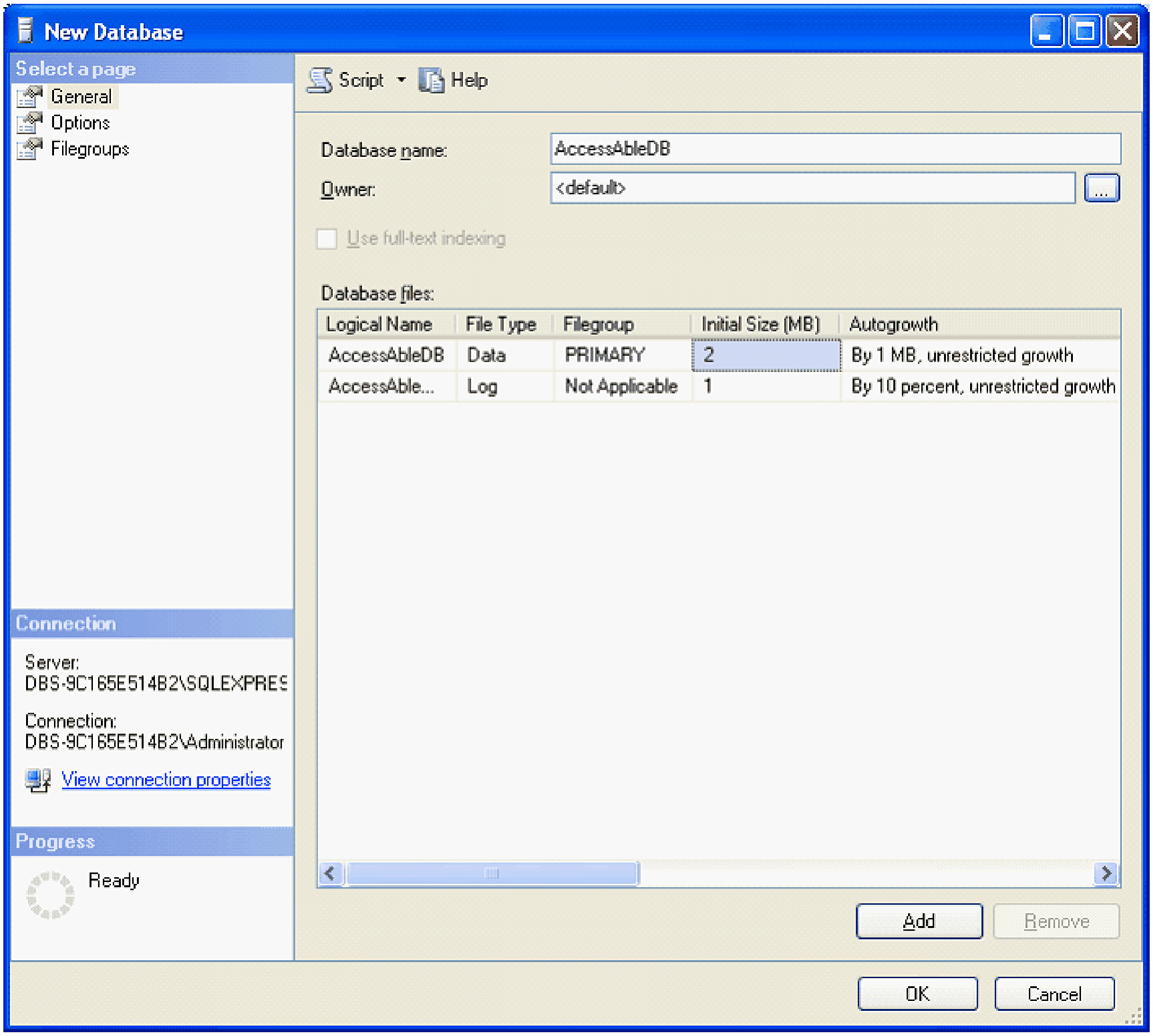


To demonstrate and test the process I used Microsoft Windows XP running Microsoft SQL Server Management Studio Express (with MSSQL 2005 Express Edition)

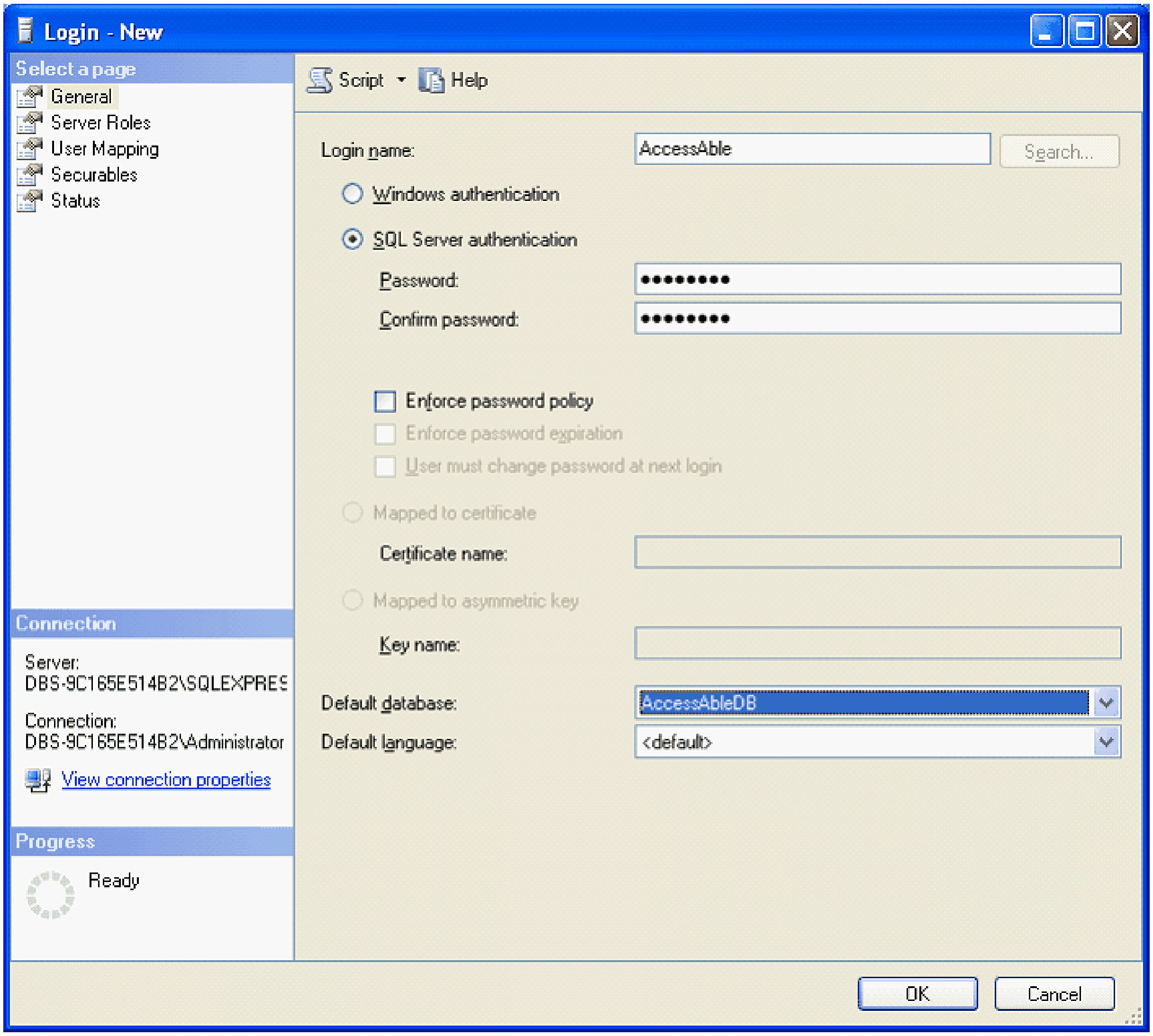
1. Connect to SSMS and select Databases in the tree as seen below.

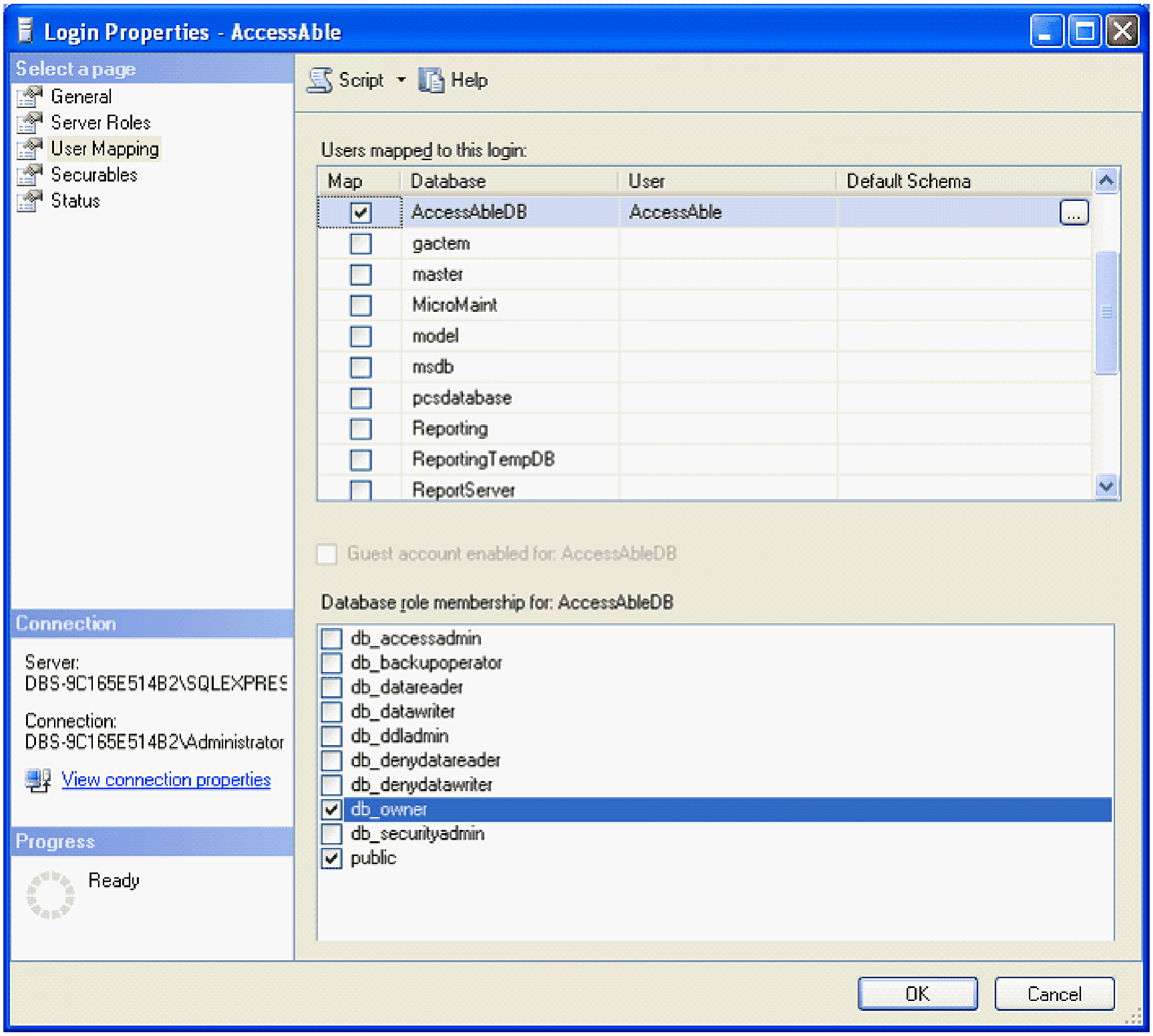


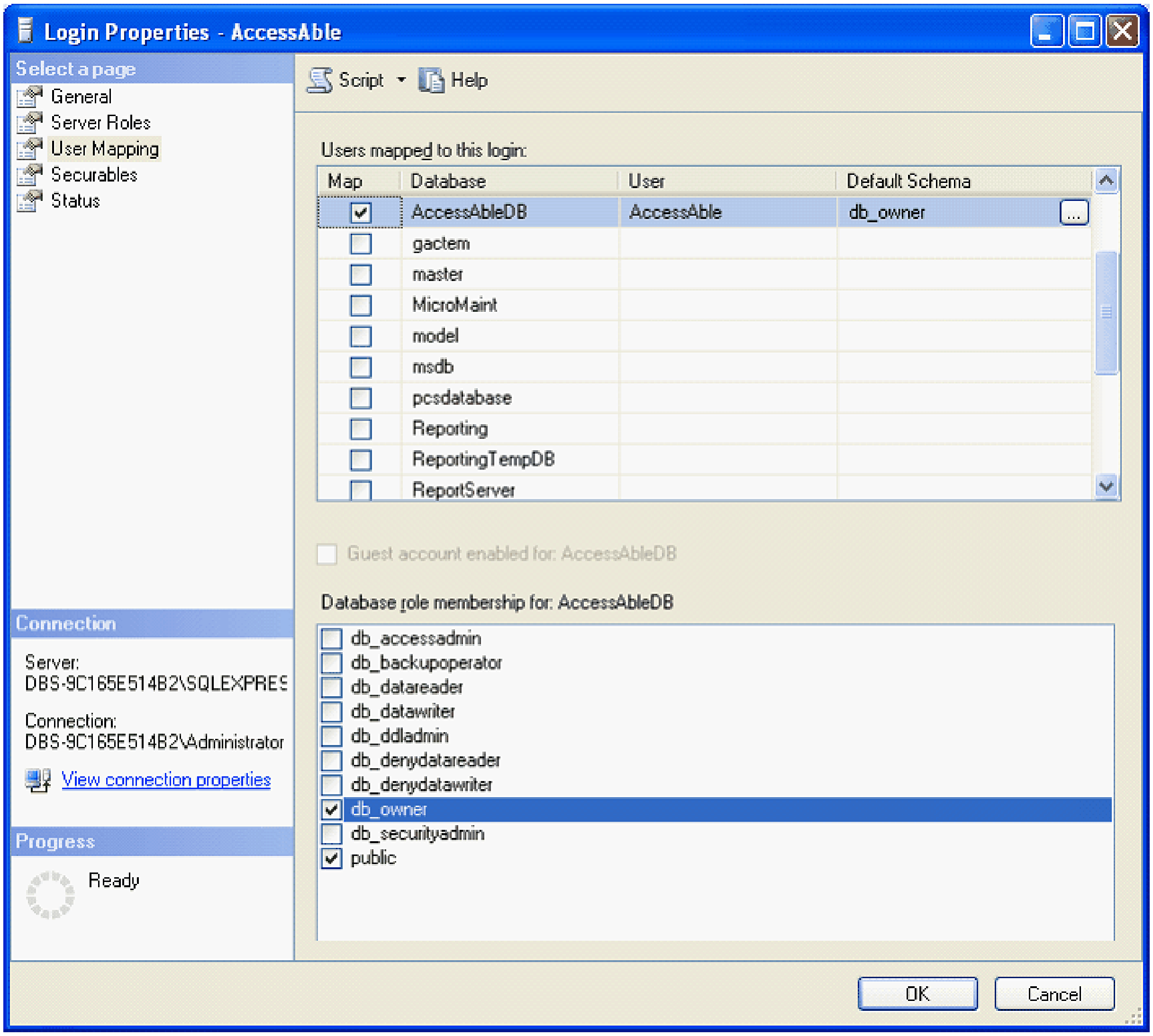
Right click and choose Create New Database. In the example screen below I have used the name AccessAbleDB for the database name. You can use whatever name you like.



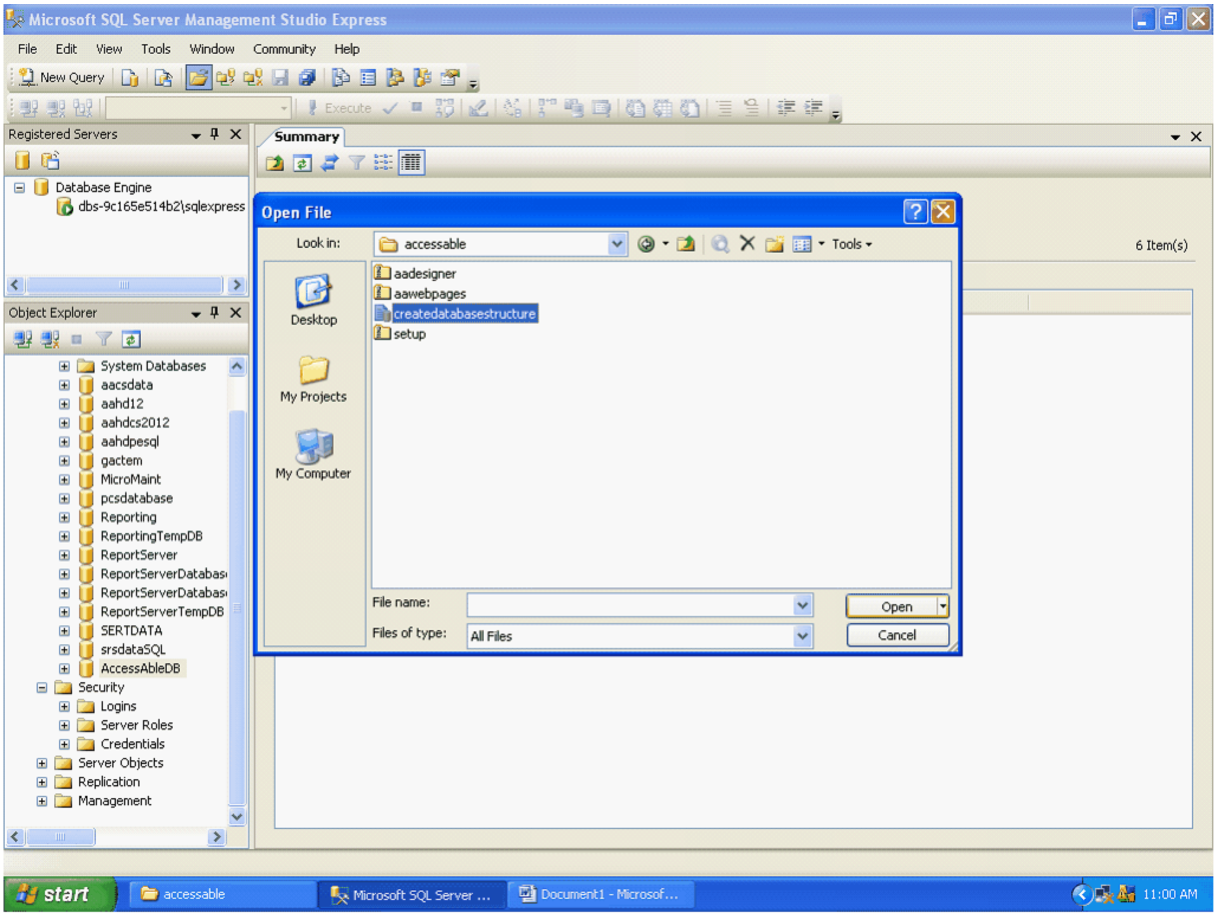
You may use the SQL Server account you started with, but this may be an SA account and you should create a non-SA account. In the example below I have created an account with the name of AccessAble and create a password of HelpDesk (in real life you will want to create stronger passwords).

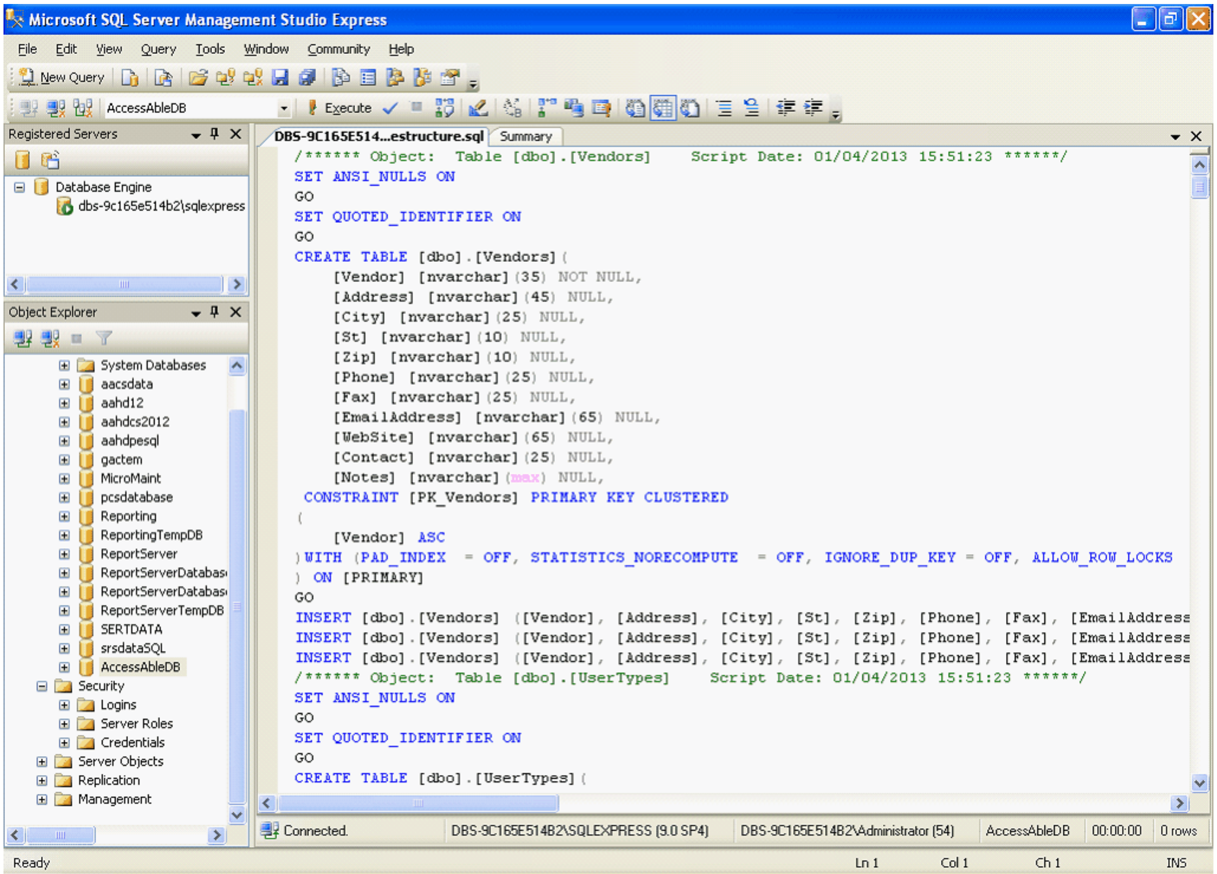

Login - New
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Login name:
AccessAble
Search...
Windows authentication
SQL Server authentication
Password:
Confirm password:
Enforce password policy
Enforce password expiration
User must change password at next login
Mapped to certificate
Certificate name:
Mapped to asymmetric key
Key name:
Default database:
AccessAbleDB
Default language:
<default>
Connection
Server:
DBS-9C165E514B2\SQLEXPRES
Connection:
DBS-9C165E514B2\Administrator
View connection properties
Progress
Ready
OK
Cancel

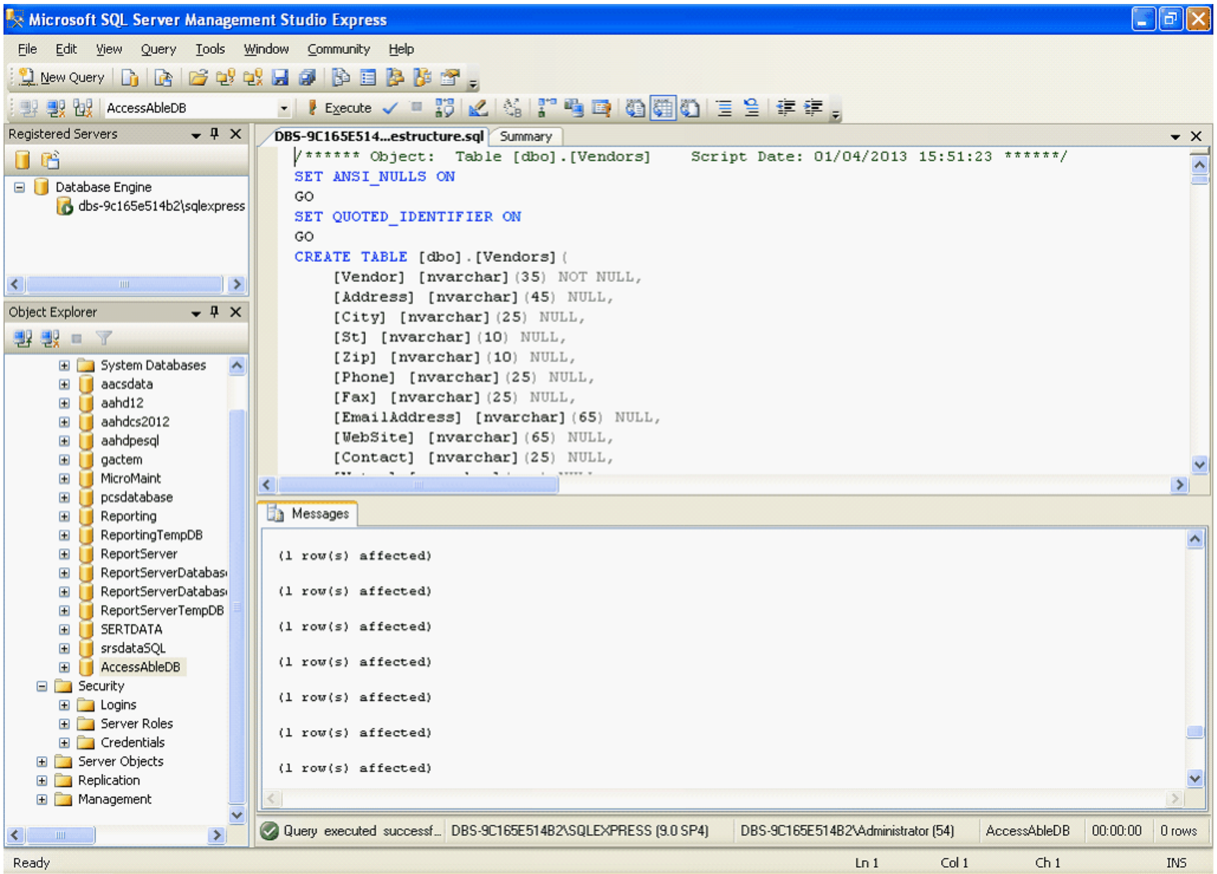

Login Properties - AccessAble
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Users mapped to this login:
Map
Database
User
Default Schema
AccessAbleDB
AccessAble
gactem
master
MicroMaint
model
msdb
pcsdatabase
Reporting
ReportingTempDB
ReportServer
Guest account enabled for: AccessAbleDB
Database role membership for: AccessAbleDB
db_accessadmin
db_backupoperator
db_datareader
db_datawriter
db_ddladmin
db_denydatareader
db_denydatawriter
db_owner
db_securityadmin
public
Connection
Server:
DBS-9C165E514B2\SQLEXPRES
Connection:
DBS-9C165E514B2\Administrator
View connection properties
Progress
Ready
OK
Cancel

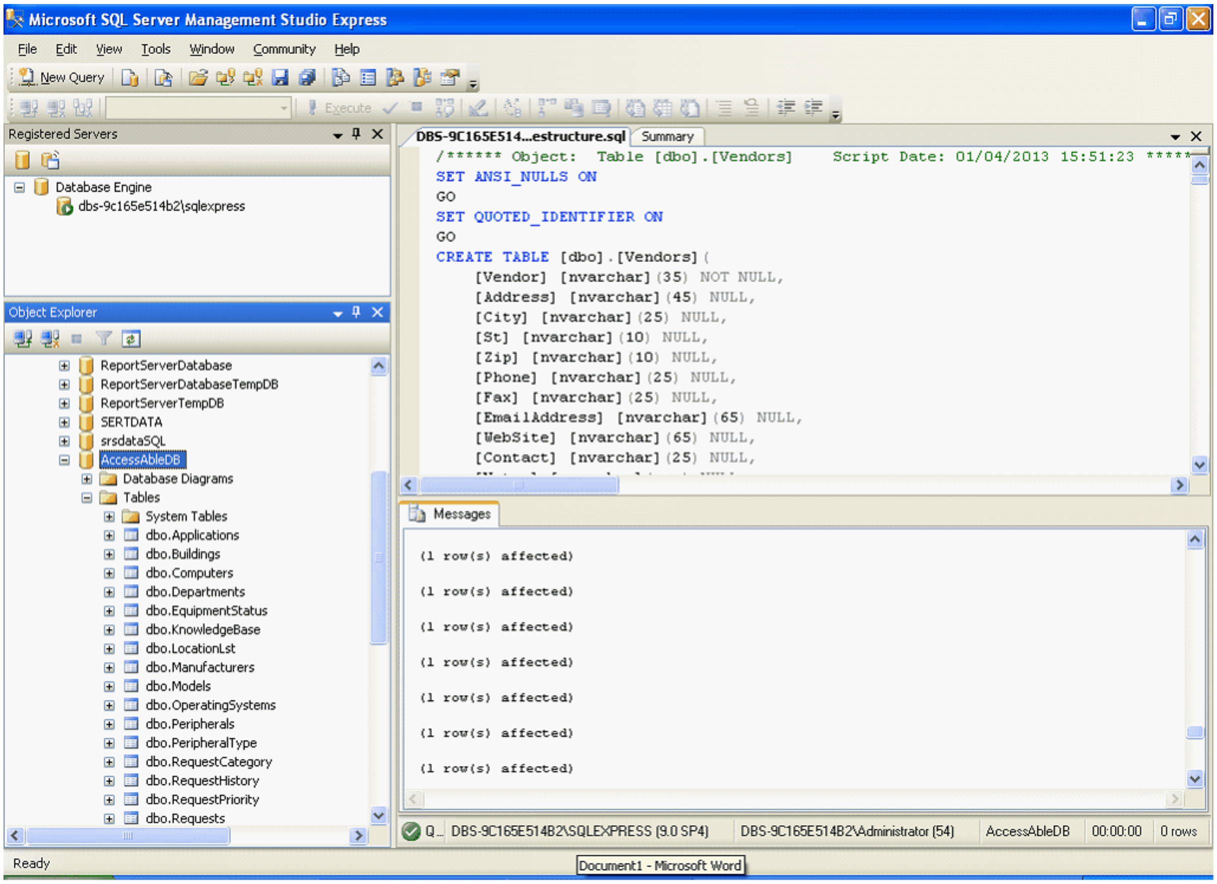


The next screen shows opening the .sql script to create the tables. Remember to have the database you created selected before you click the Execute button to load the script after you have opened it.

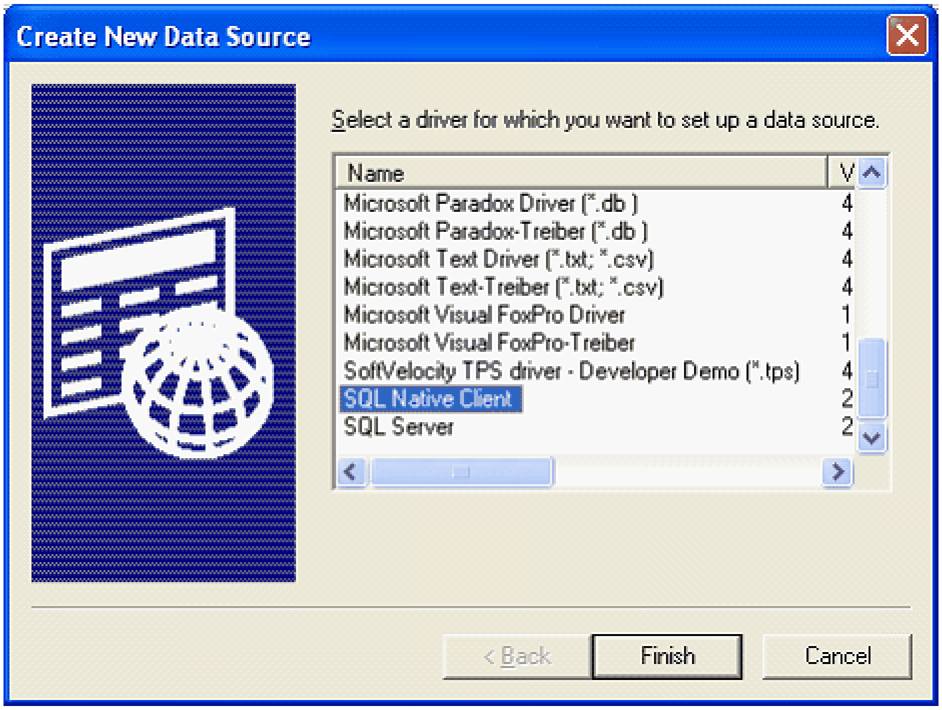

Microsoft SQL Server Management Studio Express
File Edit View Tools Window Community Help
New Query
Registered Servers
Database Engine
dbs-9c165e514b2\sqlexpress
Object Explorer
System Databases
aacsdata
aahd12
aahdcs2012
aahdpesql
gactem
MicroMaint
pcsdatabase
Reporting
ReportingTempDB
ReportServer
SERTDATA
srsdataSQL
AccessAbleDB
Security
Logins
Server Roles
Credentials
Server Objects
Replication
Management
Summary
6 Item(s)
Open File
Look in: accessable
Desktop
My Projects
My Computer
aadesigner
aawebpages
createdatabasestructure
setup
File name:
Files of type: All Files
Open
Cancel
start
accessable
Microsoft SQL Server ...
Document1 - Microsof...
11:00 AM

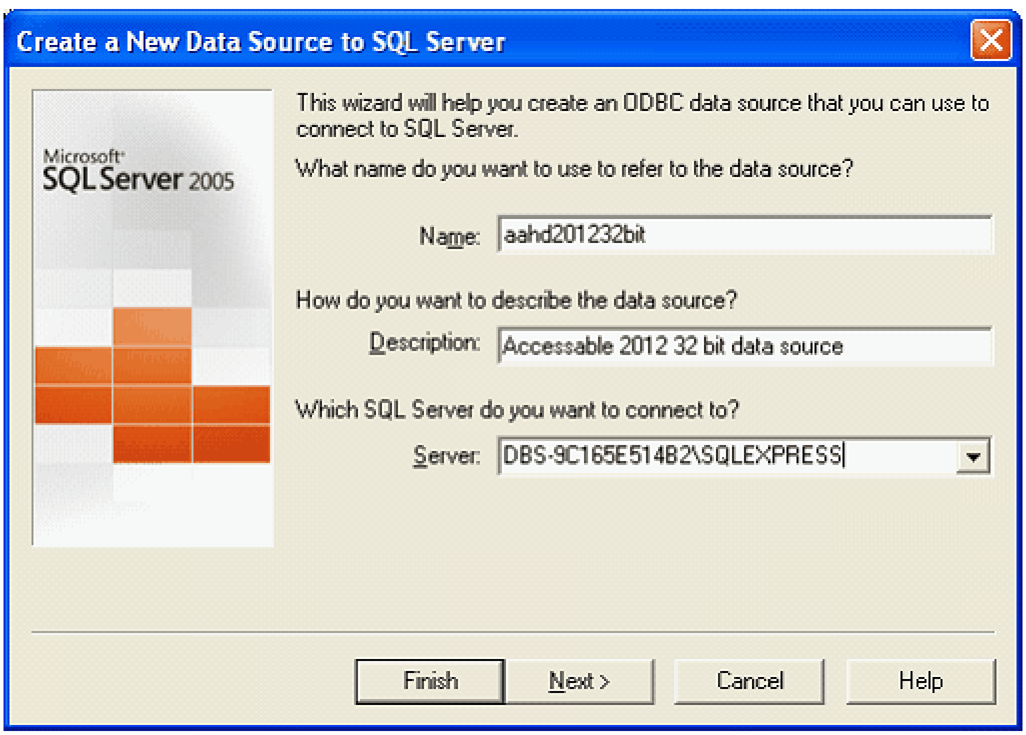


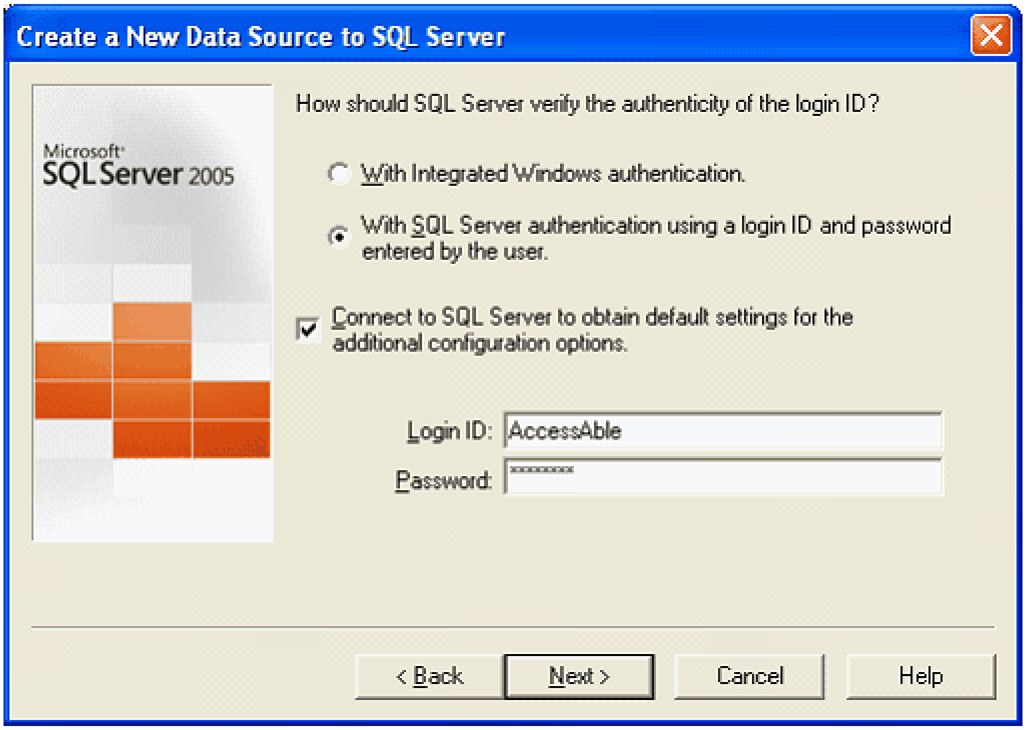

Microsoft SQL Server Management Studio Express
File Edit View Query Tools Window Community Help
New Query
AccessAbleDB
Execute
Registered Servers
Database Engine
dbs-9c165e514b2\sqlexpress
Object Explorer
System Databases
aacsdata
aahd12
aahdcs2012
aahdpesql
gactem
MicroMaint
pcsdatabase
Reporting
ReportingTempDB
ReportServer
ReportServerDatabas
ReportServerDatabas
ReportServerTempDB
SERTDATA
srsdataSQL
AccessAbleDB
Security
Logins
Server Roles
Credentials
Server Objects
Replication
Management
DBS-9C165E514...estructure.sql
Summary
/****** Object: Table [dbo].[Vendors] Script Date: 01/04/2013 15:51:23 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
CREATE TABLE [dbo].[Vendors](
[Vendor] [nvarchar](35) NOT NULL,
[Address] [nvarchar](45) NULL,
[City] [nvarchar](25) NULL,
[St] [nvarchar](10) NULL,
[Zip] [nvarchar](10) NULL,
[Phone] [nvarchar](25) NULL,
[Fax] [nvarchar](25) NULL,
[EmailAddress] [nvarchar](65) NULL,
[WebSite] [nvarchar](65) NULL,
[Contact] [nvarchar](25) NULL,
Messages
(1 row(s) affected)
(1 row(s) affected)
(1 row(s) affected)
(1 row(s) affected)
(1 row(s) affected)
(1 row(s) affected)
(1 row(s) affected)
Query executed successf...
DBS-9C165E514B2\SQLEXPRESS (9.0 SP4)
DBS-9C165E514B2\Administrator (54)
AccessAbleDB
00:00:00
0 rows
Ready
Ln 1
Col 1
Ch 1
INS

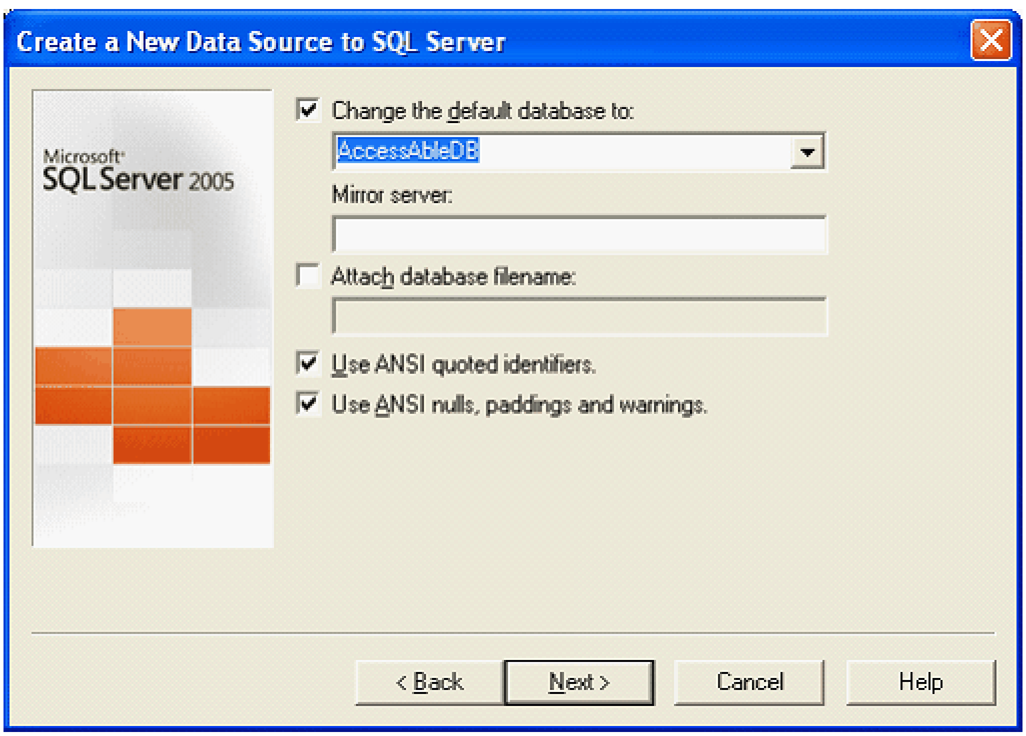


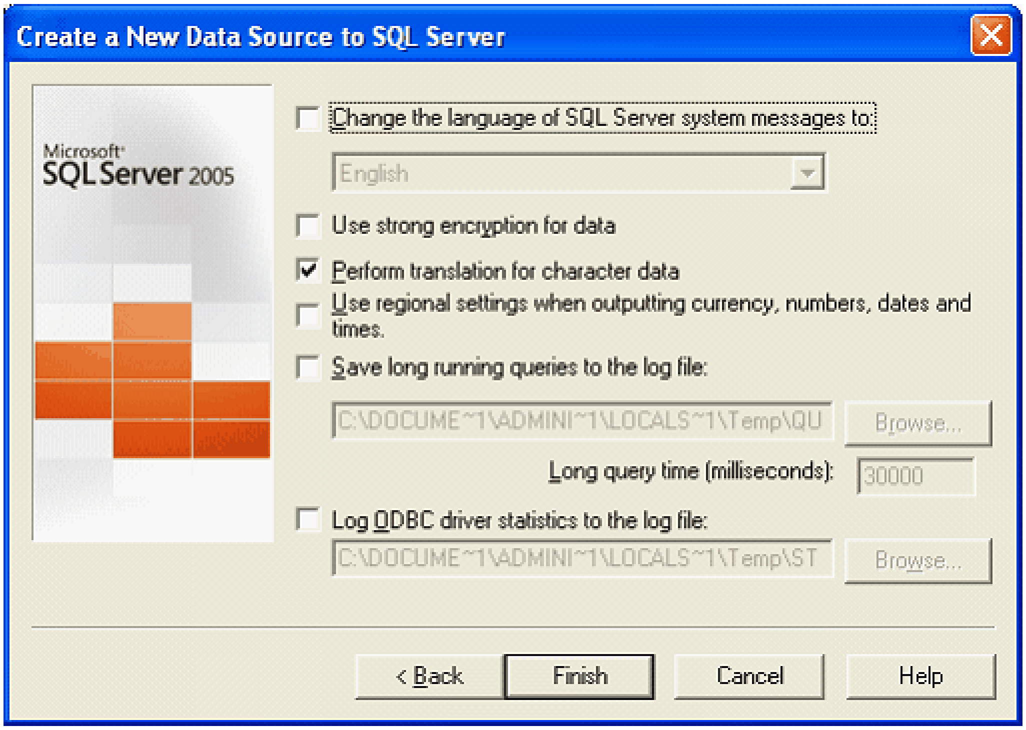
After creating the database you will need to set up the ODBC Data Source: you will need the Server Name or IP address, database name, and user name and password.

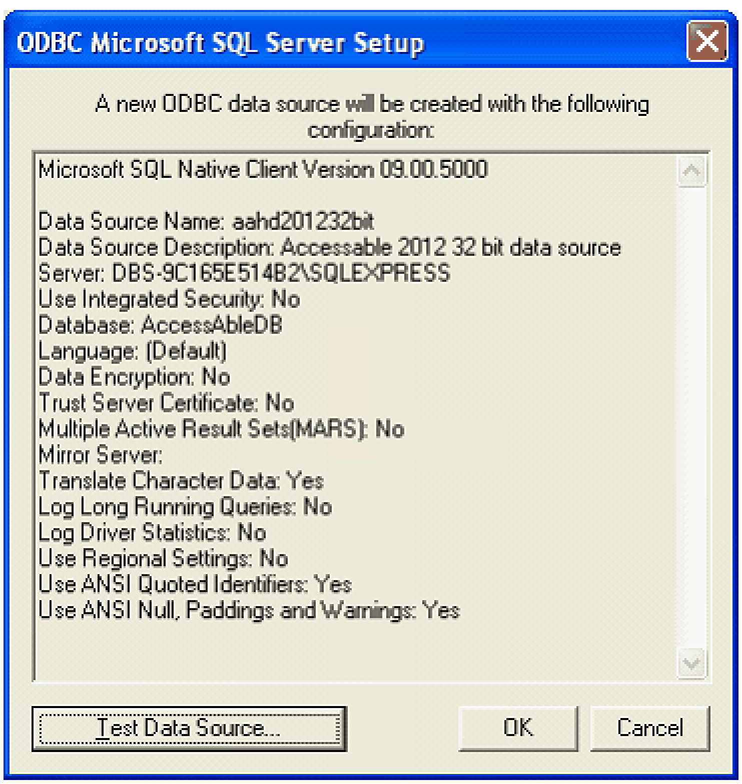

Create New Data Source
Select a driver for which you want to set up a data source.
Name
V
Microsoft Paradox Driver (*.db) 4
Microsoft Paradox-Treiber (*.db) 4
Microsoft Text Driver (*.txt; *.csv) 4
Microsoft Text-Treiber (*.txt; *.csv) 4
Microsoft Visual FoxPro Driver 1
Microsoft Visual FoxPro-Treiber 1
SoftVelocity TPS driver - Developer Demo (*.tps) 4
SQL Native Client 2
SQL Server 2
< Back
Finish
Cancel


Create a New Data Source to SQL Server
Microsoft SQL Server 2005
This wizard will help you create an ODBC data source that you can use to connect to SQL Server.
What name do you want to use to refer to the data source?
Name: aahd201232bit
How do you want to describe the data source?
Description: Accessable 2012 32 bit data source
Which SQL Server do you want to connect to?
Server: DBS-9C165E514B2\SQLEXPRESS
Finish
Next >
Cancel
Help


Create a New Data Source to SQL Server
Microsoft SQL Server 2005
How should SQL Server verify the authenticity of the login ID?
With Integrated Windows authentication.
With SQL Server authentication using a login ID and password entered by the user.
Connect to SQL Server to obtain default settings for the additional configuration options.
Login ID: AccessAble
Password:
< Back
Next >
Cancel
Help

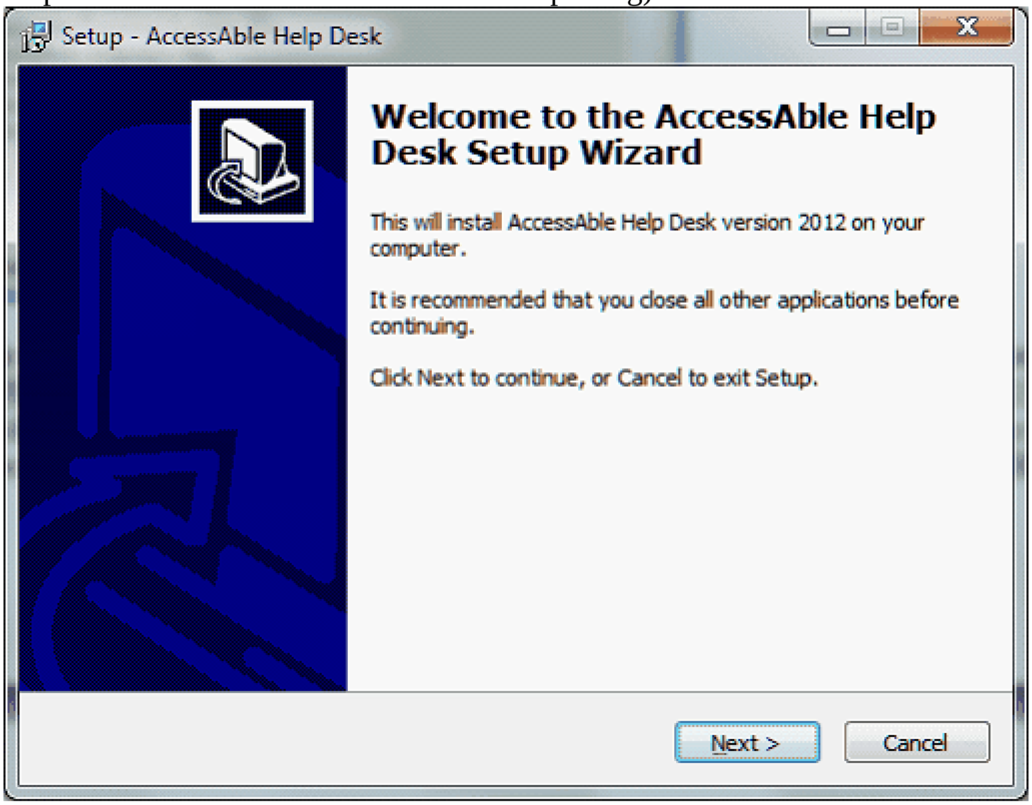

Create a New Data Source to SQL Server
Microsoft SQL Server 2005
Change the default database to:
AccessAbleDB
Mirror server:
Attach database filename:
Use ANSI quoted identifiers.
Use ANSI nulls, paddings and warnings.
< Back
Next >
Cancel
Help

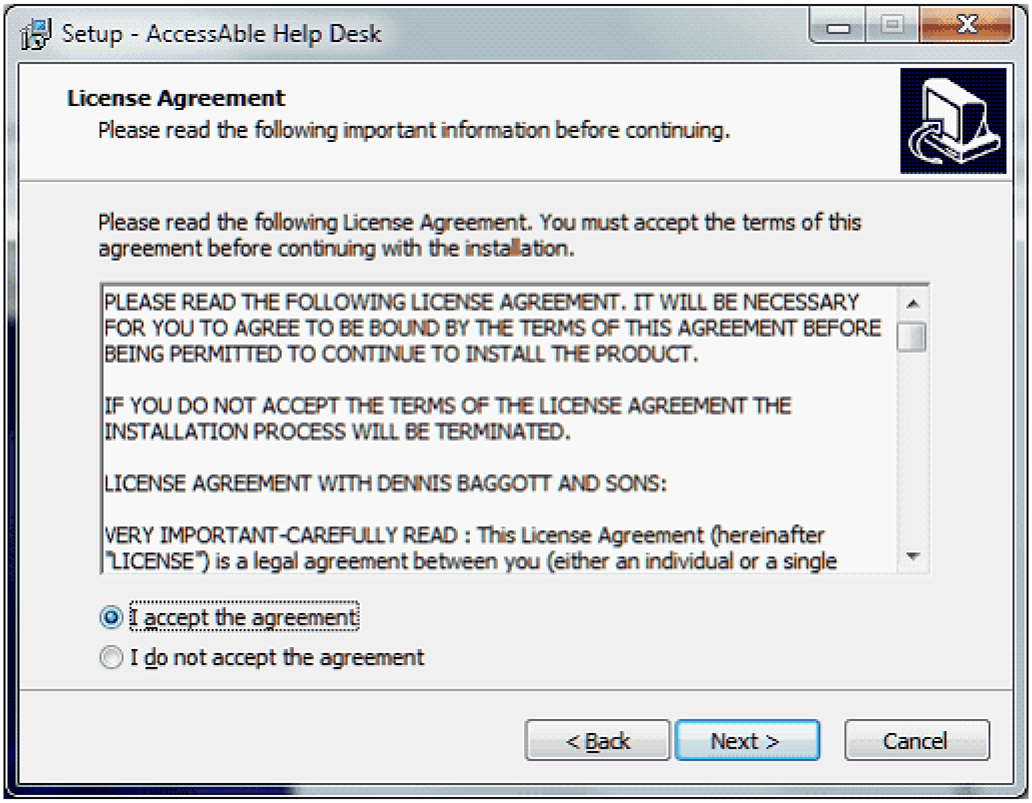


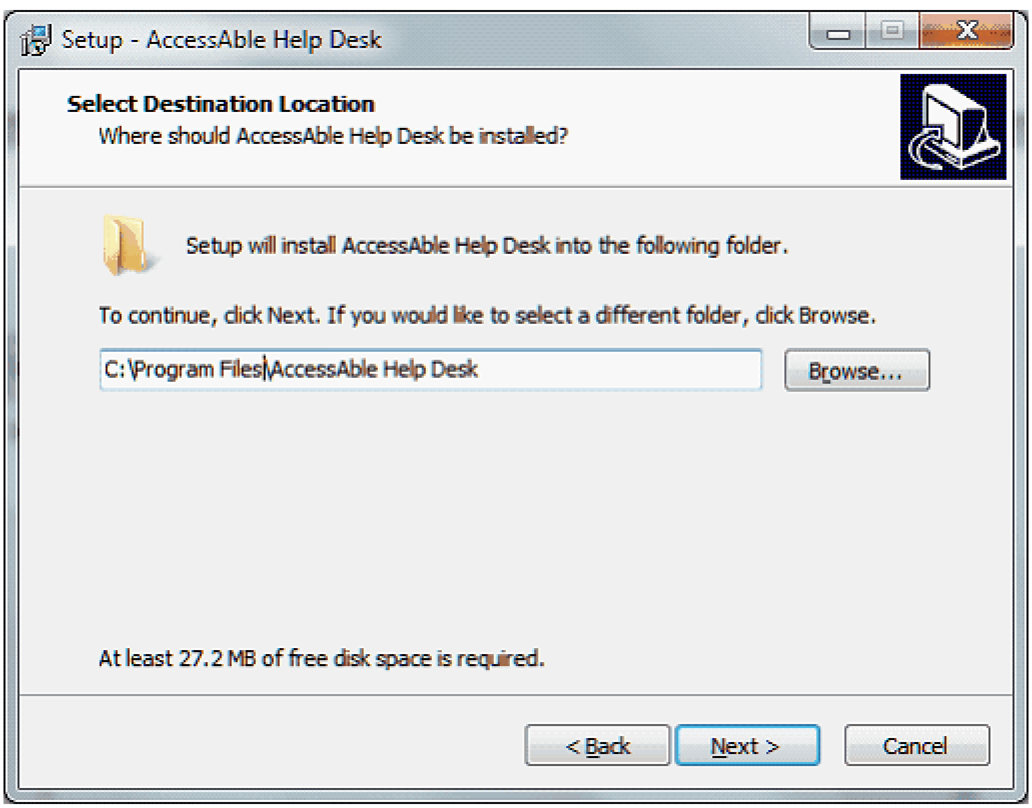


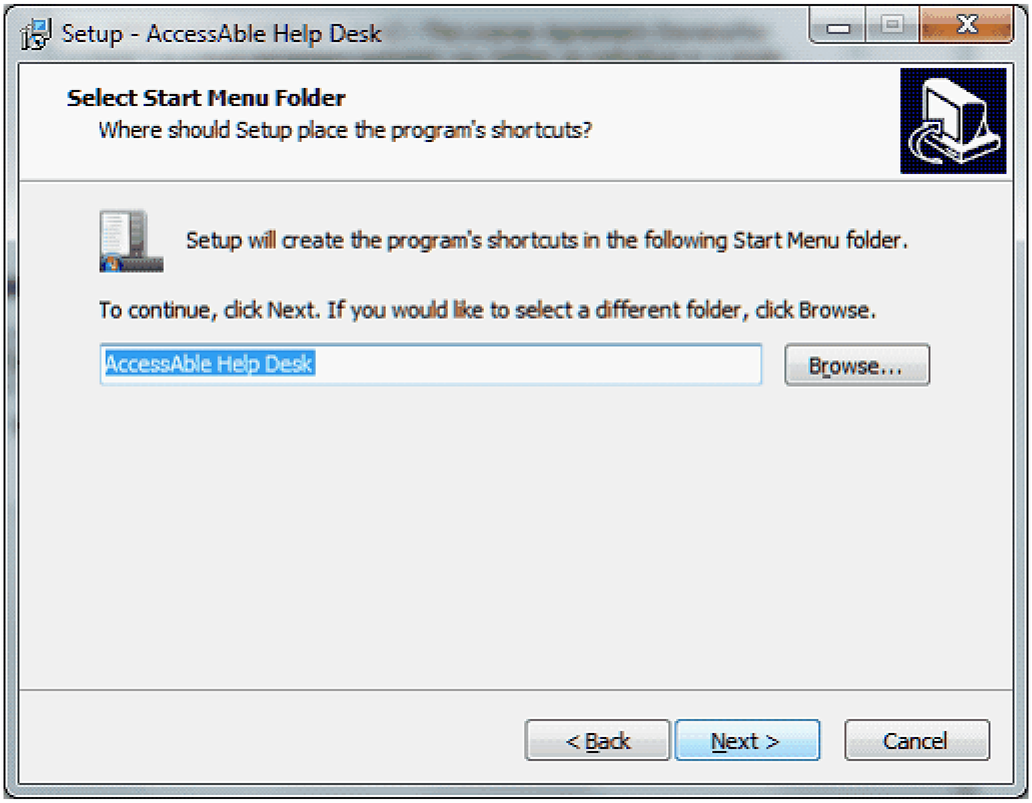
After you have created and tested the ODBC connection you are ready to run the Setup.
NOTE: If you have multiple users that will be running AccessAble Help Desk 2012 and all will be connecting to the same database, you only need to run the script to create the tables

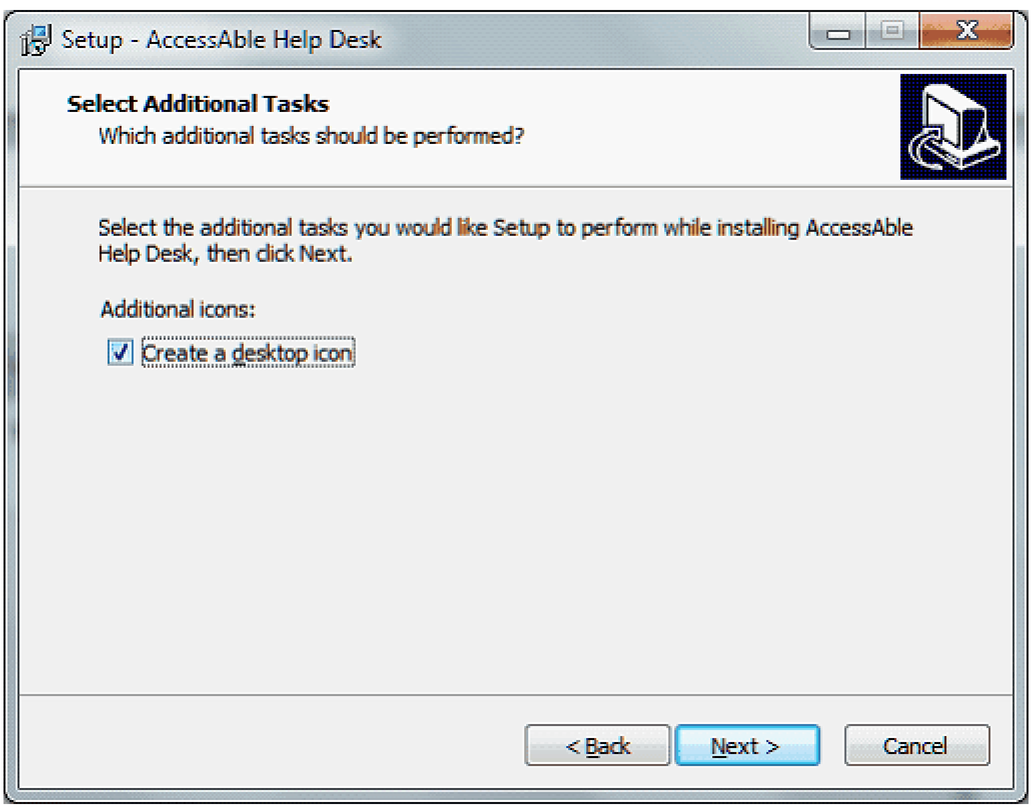
once, but each user running the desktop application will need to create an ODBC connection as described and run the setup program from their computer. However, if using the web interface provided to licensed owners, ODBC configuration is not required and the windows install does not need to be run for web only users (such as end users just submitting requests or help desk staff that won't need enhanced reporting).

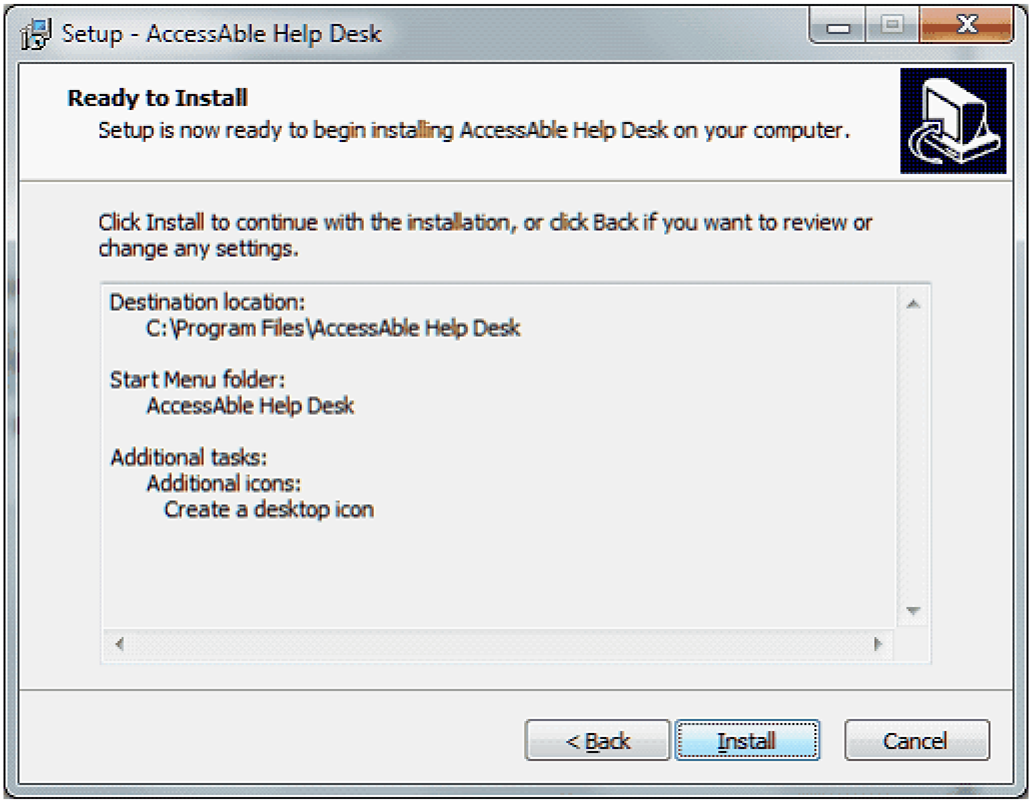


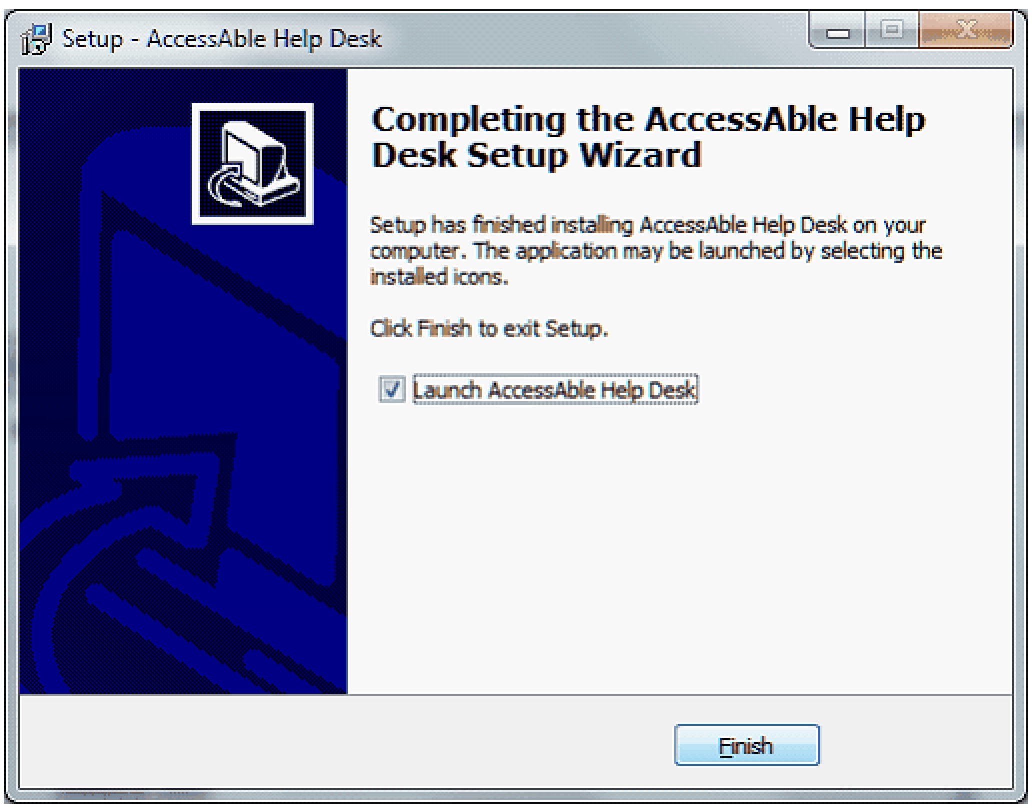

Setup - AccessAble Help Desk
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
PLEASE READ THE FOLLOWING LICENSE AGREEMENT. IT WILL BE NECESSARY FOR YOU TO AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT BEFORE BEING PERMITTED TO CONTINUE TO INSTALL THE PRODUCT.
IF YOU DO NOT ACCEPT THE TERMS OF THE LICENSE AGREEMENT THE INSTALLATION PROCESS WILL BE TERMINATED.
LICENSE AGREEMENT WITH DENNIS BAGGOTT AND SONS:
VERY IMPORTANT-CAREFULLY READ : This License Agreement (hereinafter "LICENSE") is a legal agreement between you (either an individual or a single
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

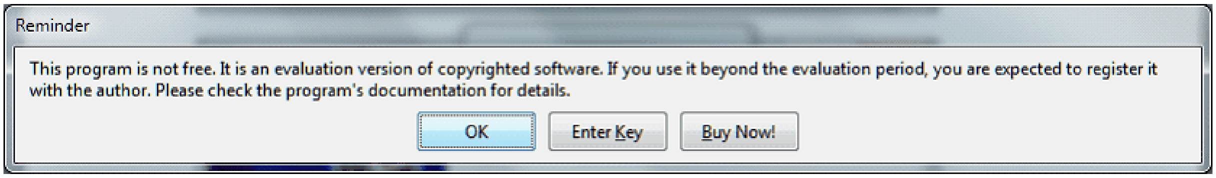

Setup - AccessAble Help Desk
Select Destination Location
Where should AccessAble Help Desk be installed?
Setup will install AccessAble Help Desk into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\AccessAble Help Desk
Browse...
At least 27.2 MB of free disk space is required.
< Back
Next >
Cancel

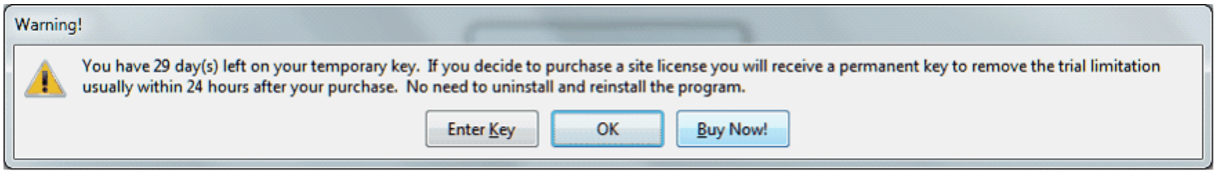

Setup - AccessAble Help Desk
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
AccessAble Help Desk
Browse...
< Back
Next >
Cancel

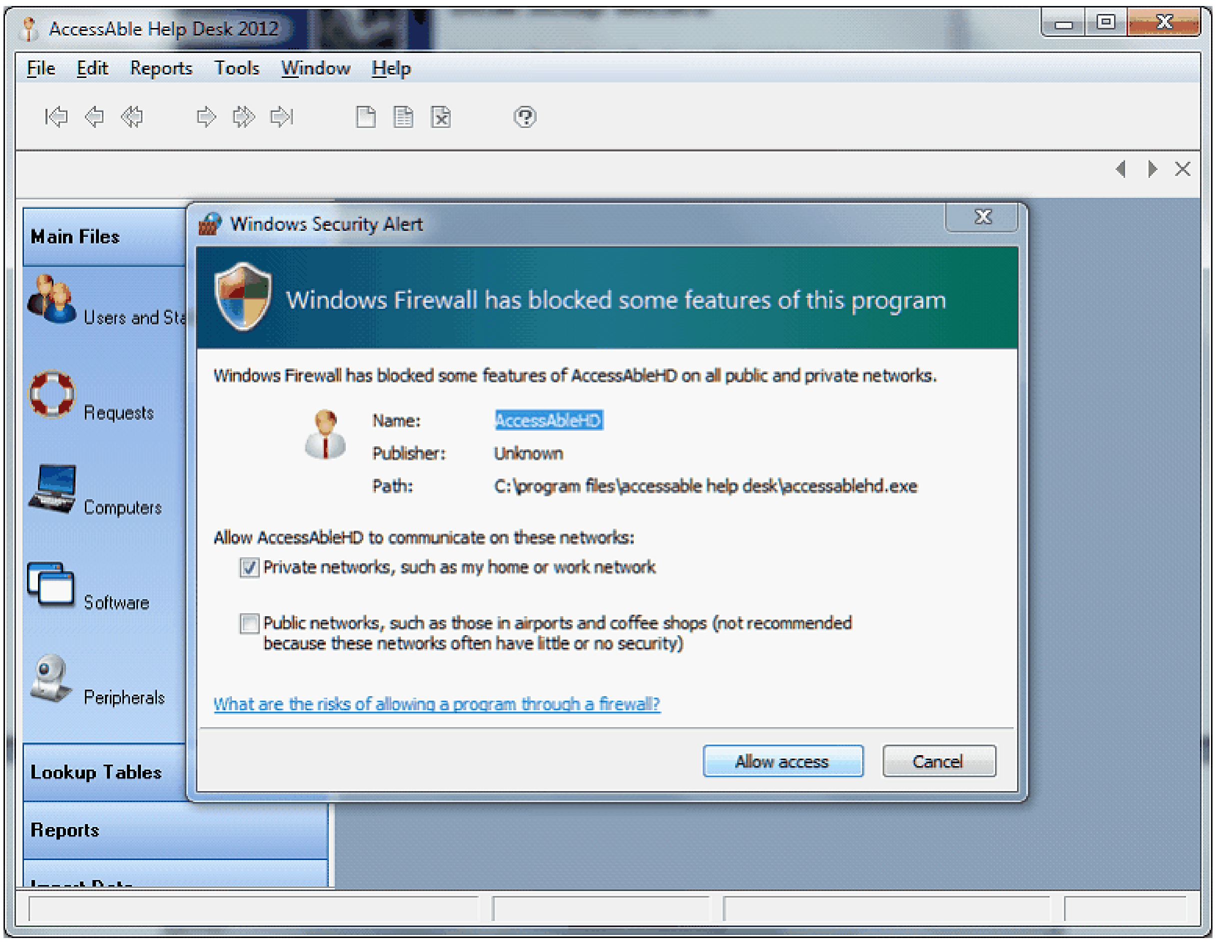

Setup - AccessAble Help Desk
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing AccessAble Help Desk, then click Next.
Additional icons:
Create a desktop icon
< Back
Next >
Cancel

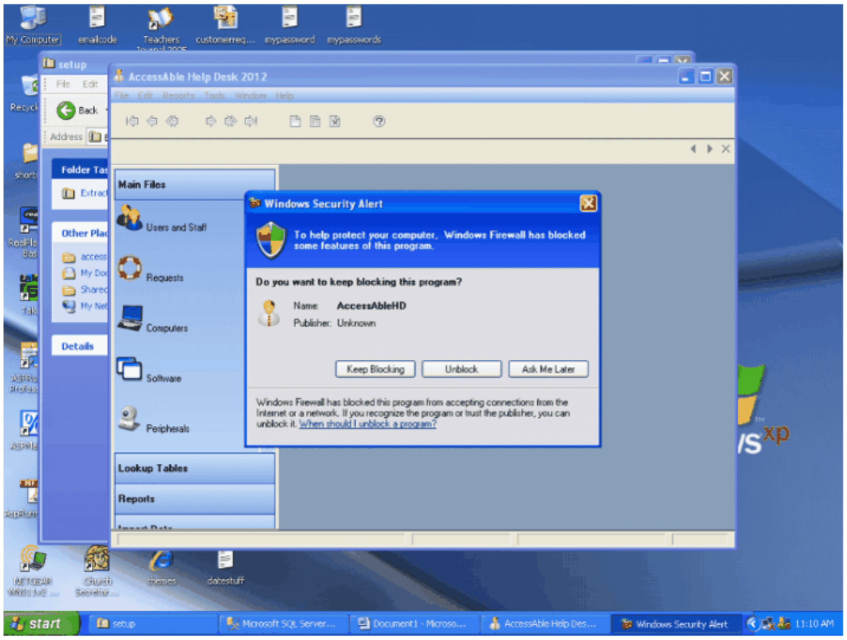

Setup - AccessAble Help Desk
Ready to Install
Setup is now ready to begin installing AccessAble Help Desk on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files\AccessAble Help Desk
Start Menu folder:
AccessAble Help Desk
Additional tasks:
Additional icons:
Create a desktop icon
< Back
Install
Cancel

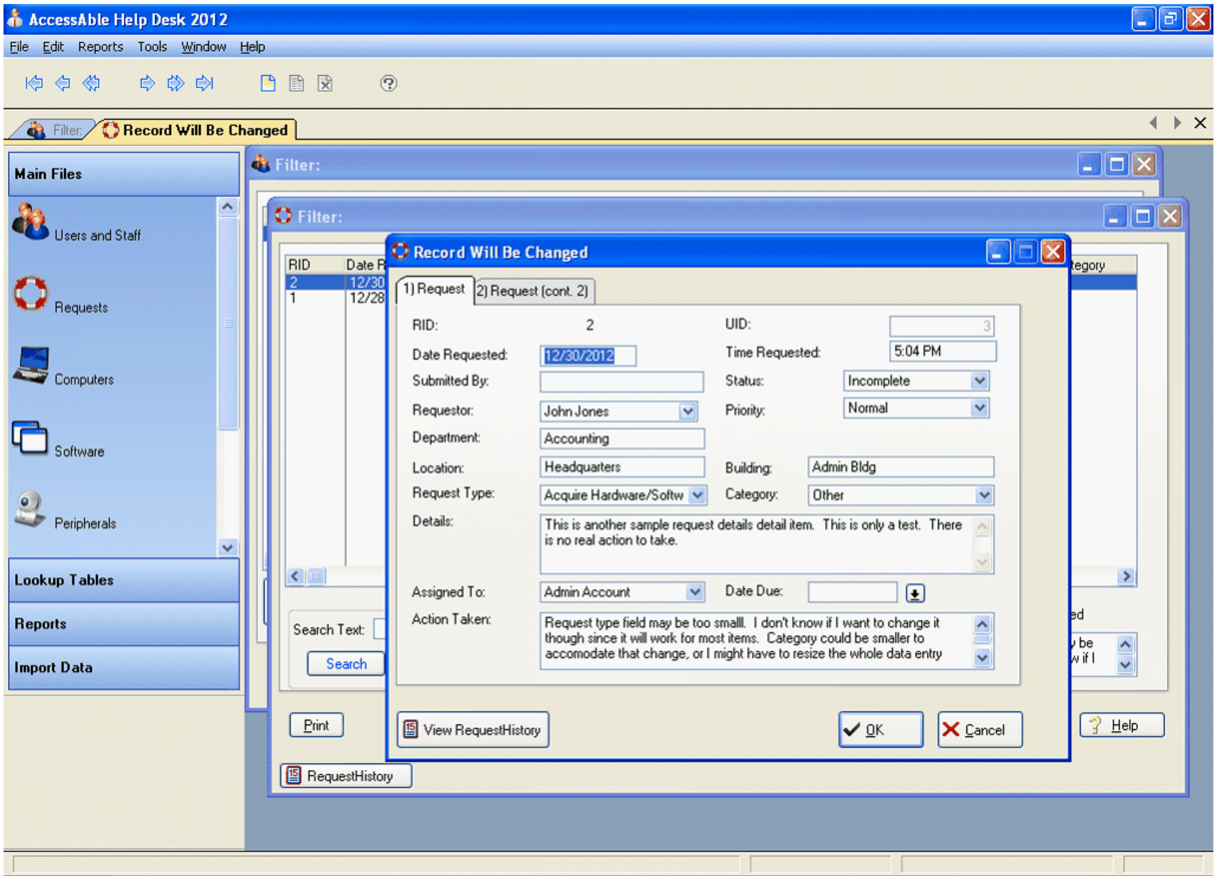

Setup - AccessAble Help Desk
Completing the AccessAble Help Desk Setup Wizard
Setup has finished installing AccessAble Help Desk on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Launch AccessAble Help Desk
Finish


Reminder
This program is not free. It is an evaluation version of copyrighted software. If you use it beyond the evaluation period, you are expected to register it with the author. Please check the program's documentation for details.
OK
Enter Key
Buy Now!


Warning!
You have 29 day(s) left on your temporary key. If you decide to purchase a site license you will receive a permanent key to remove the trial limitation usually within 24 hours after your purchase. No need to uninstall and reinstall the program.
Enter Key
OK
Buy Now!


AccessAble Help Desk 2012
File Edit Reports Tools Window Help
Main Files
Users and St
Requests
Computers
Software
Peripherals
Lookup Tables
Reports
Windows Security Alert
Windows Firewall has blocked some features of this program
Windows Firewall has blocked some features of AccessAbleHD on all public and private networks.
Name: AccessAbleHD
Publisher: Unknown
Path: C:\program files\accessable help desk\accessablehd.exe
Allow AccessAbleHD to communicate on these networks:
Private networks, such as my home or work network
Public networks, such as those in airports and coffee shops (not recommended because these networks often have little or no security)
What are the risks of allowing a program through a firewall?
Allow access
Cancel

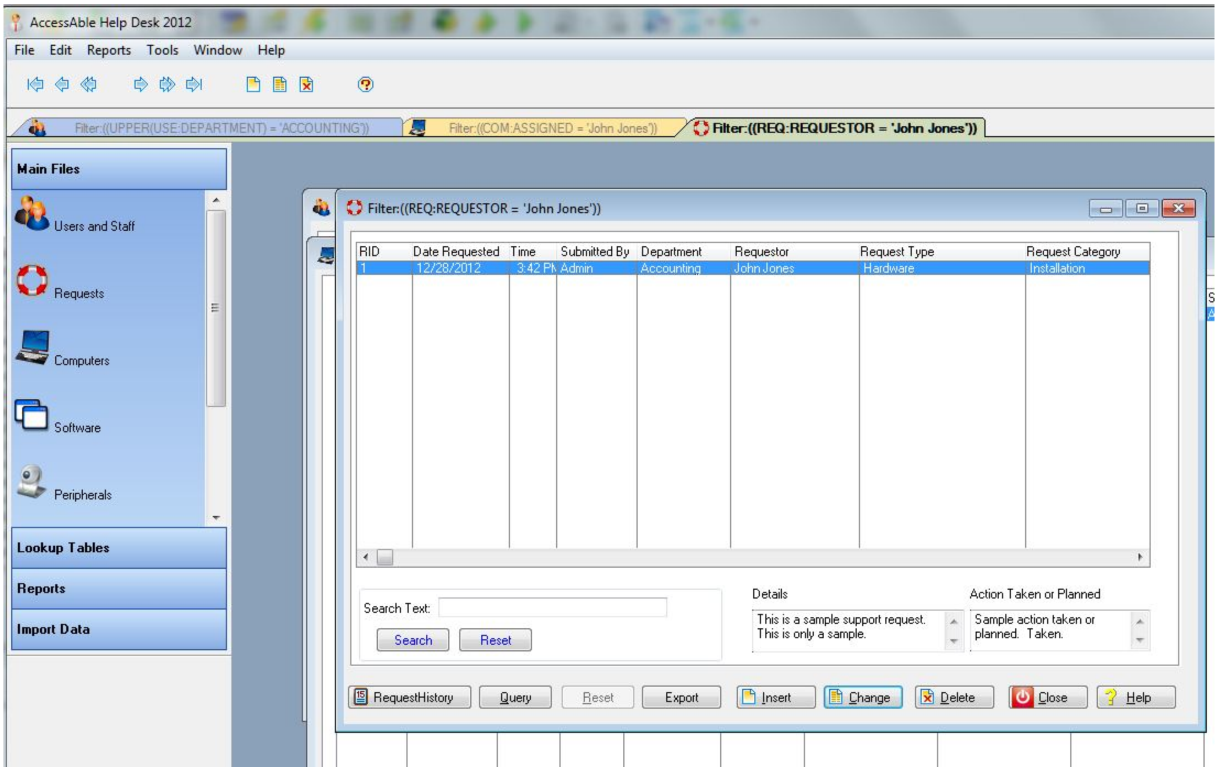

AccessAble Help Desk 2012
Main Files
Users and Staff
Requests
Computers
Software
Peripherals
Lookup Tables
Reports
Windows Security Alert
To help protect your computer, Windows Firewall has blocked some features of this program.
Do you want to keep blocking this program?
Name: AccessAbleHD
Publisher: Unknown
Keep Blocking
Unblock
Ask Me Later
Windows Firewall has blocked this program from accepting connections from the Internet or a network. If you recognize the program or trust the publisher, you can unblock it. When should I unblock a program?
start



2 Main Files

2.1 Overview

The main files used are Users and Staff information, Requests, Computer, Peripherals , Software and Knowledge Base. Unlike the lookup table browse screens, the screens used to browse the main files have more options. For example, right click on a cell (intersection of a column and row in a browse screen) and a menu like the one below will pop up. Many of the options are the same as you can access by clicking a button (Insert, Change, Delete for example) however, other options like filtering on the contents of a cell are included. Several of the main files are related to other files. For example 1 User may have many related Requests and 1 Computer may have many related peripherals or software items that are related. In addition 1 Request may have many related Request History items. The 1 side of the relation ship may be considered a "Parent" and the many side is the "Child" to the parent file. After using the program for a little while you will see how this is helpful.



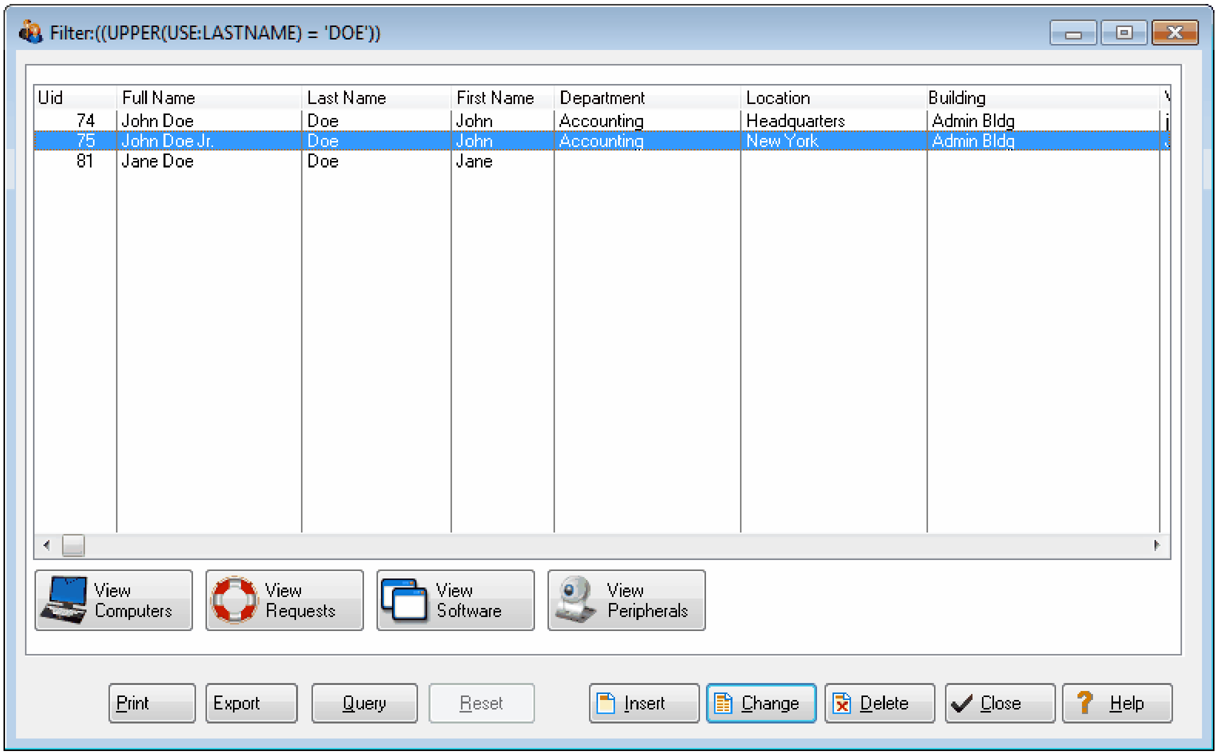
2.2 User Information

In previous versions I have had a table for users and a separate table for staff. One reason for this was I expected only staff members would be assigned to a Support Request. In fact I have been told that in many organizations a request is often assigned back to the request or - either for additional information or to get agreement a request has been resolved to their satisfaction. For that reason in this release I am using a single table for both Users and Staff Member information.

2.2.1 Browse Users And Staff

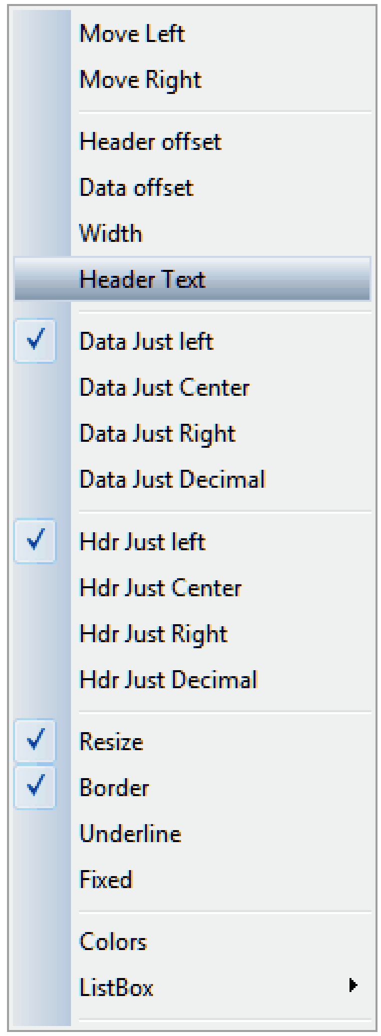
The Browse Users and Staff screen is shown below. It may the best place to start when you begin working with AccessAble Help Desk 2012 each day. Whether you are updating inventory (computers, software or peripherals) or Entering or Updating Support Requests if you start by selecting the user record in this screen you can access buttons at the lower part of the screen to view related items. The same buttons are available when you are viewing or editing a user record in the update screen.

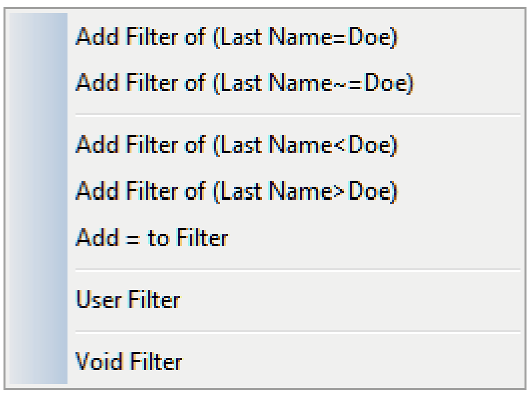
Sorting is available on many columns. When you have many records it may be helpful, for example, to click on the last name and column then begin typing the last name of the person you want to view. The rows will be filtered you type and a match or matches are found.

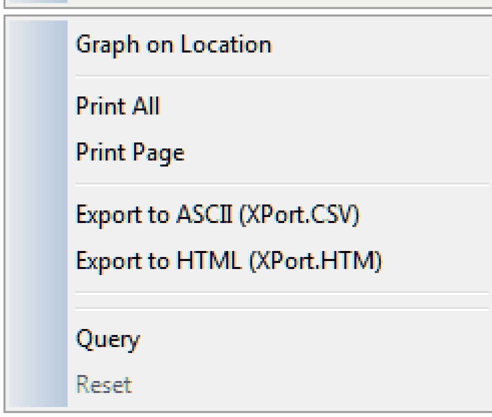


In addition to the buttons for the related "child" records a button is provided to let you quickly export user information, a Query (and if a query is active) and Reset button for using the Query Wizard, as well as the buttons for Creating (inserting), Changing or Deleting user records. A Close and Help button is also on this screen.

Don't forget the options available when you Right Click a cell on this screen.



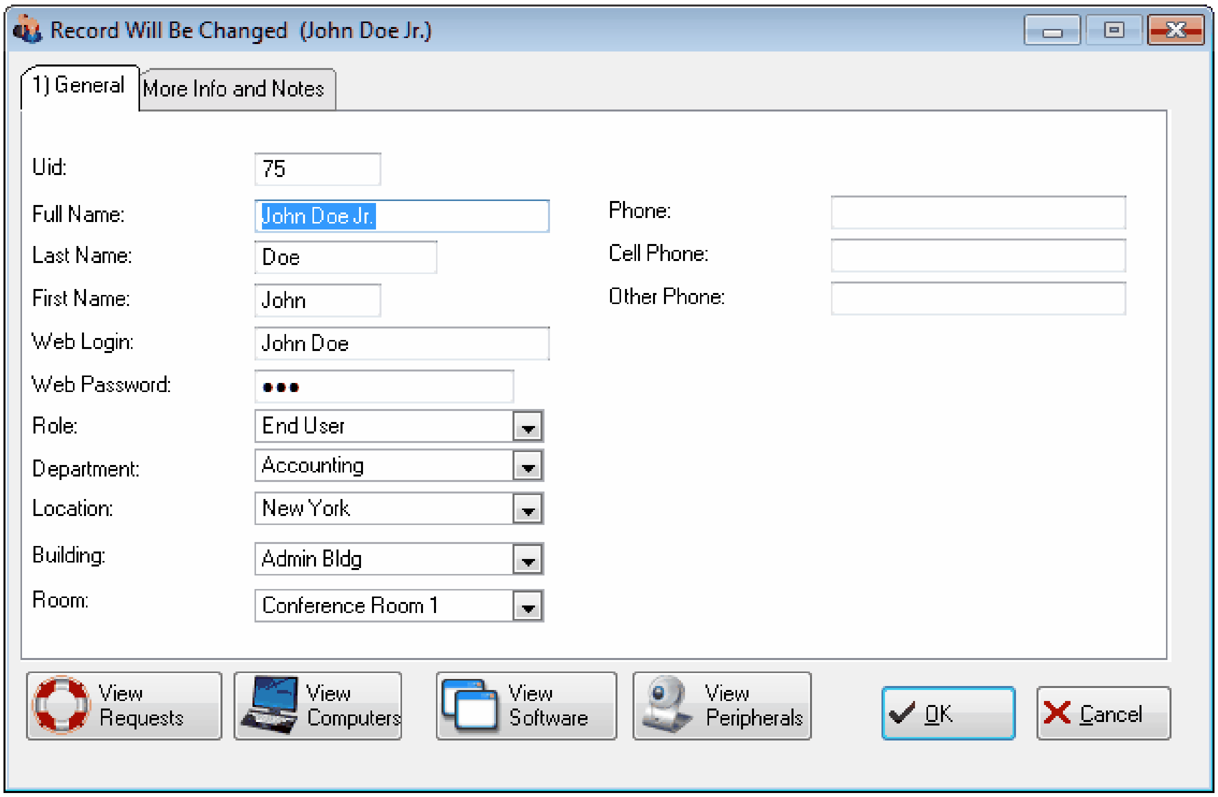




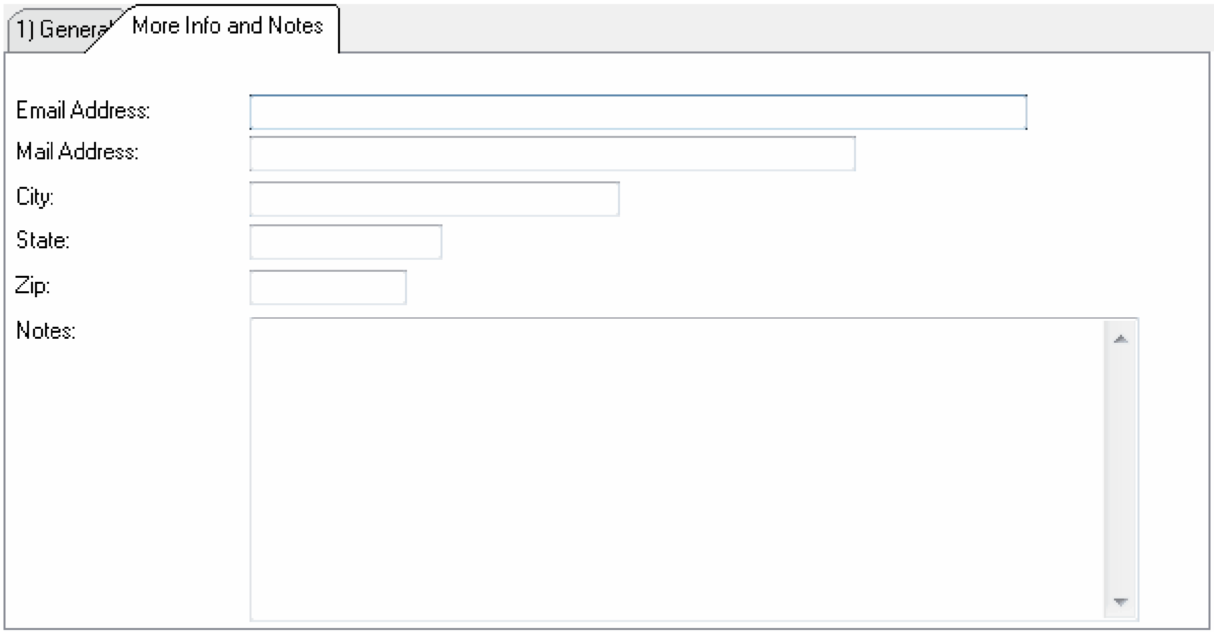
2.2.2 Update Users and Staff

This screen is used to add or change user or staff information. There are two tabs. A UID is created automatically each time a user record is created. So, begin by entering the Full Name (first name last name, or last name first name) then enter the Last Name (some call this a Sur name) and then first name. The next few fields are important if you are using the web interface. If you use the web interface your customers can create their own account. Anyway, the Web Login name is the username that is used for logging in to the web pages. The web password is next, followed by the role. The default user role is "end user". Drop down list boxes are available for quickly entering the user or staff person's Department, Location, Building and Room. These values all come from lookup tables. You can populate these values "on the fly" but we recommend filling in the lookup tables first.

In addition to using this screen to Add and Change user information, the buttons at the bottom of the screen let you quickly access (or add) data for related tables (Requests, Computers, Software and Peripherals).



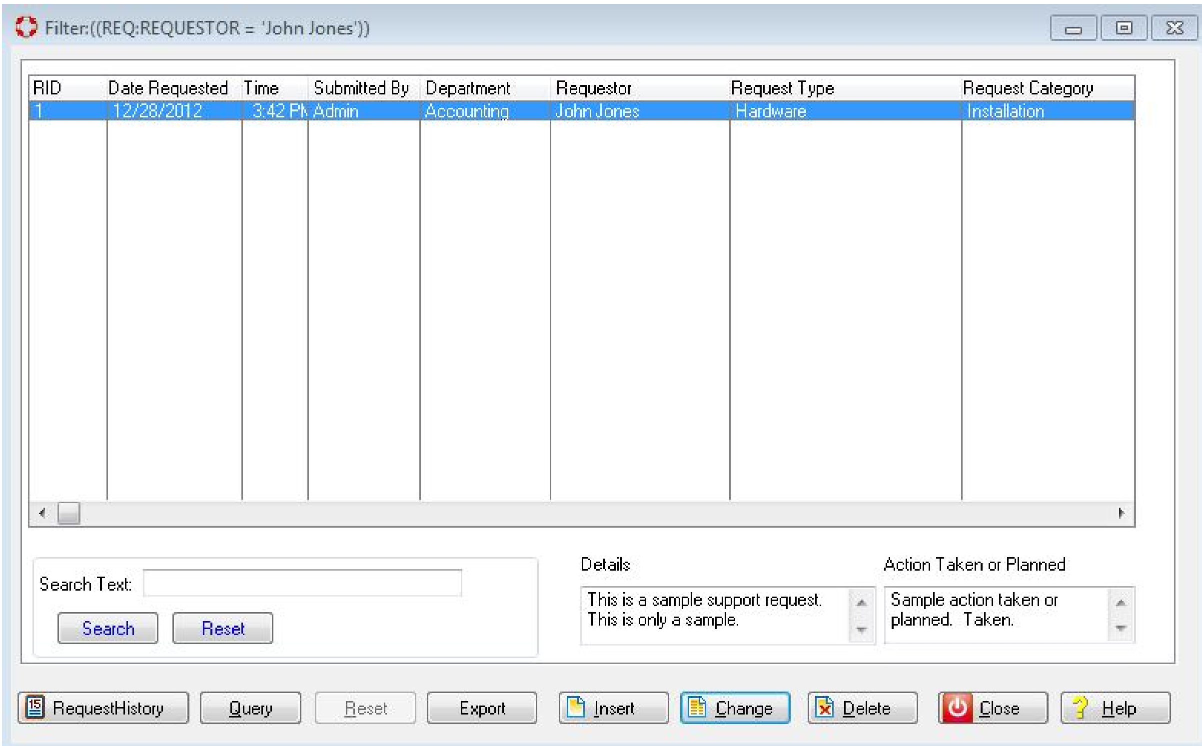
The next Tab is important for entering the email address and optionally mail address, city, state and zip (Postal) code and any notes you want to add.



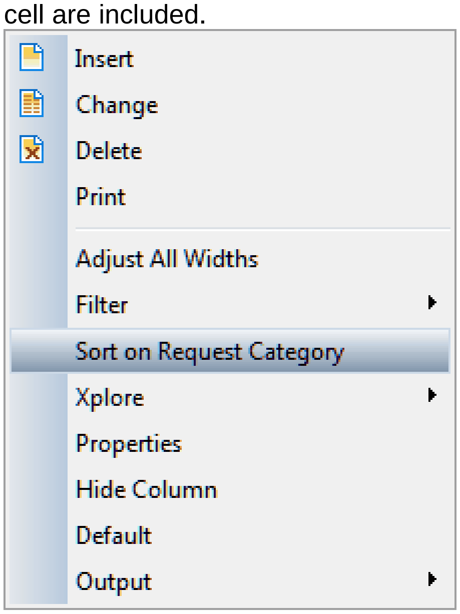
2.3 Support Requests

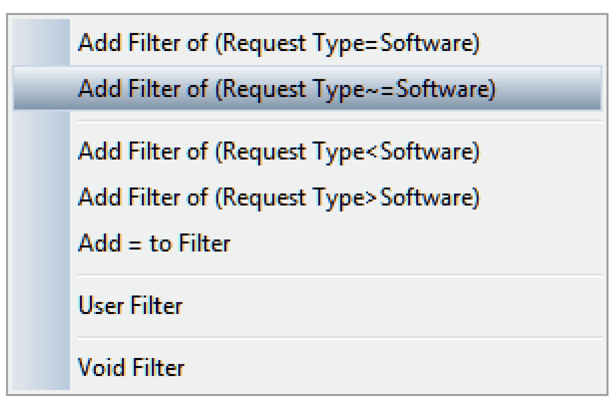
2.3.1 Browse Requests

This screen is one you will likely use most often. Using the browse screen you can quickly sort, search and filter support requests. In addition to the rows and columns two text boxes at the bottom of the screen let you preview the selected requests Details and Action Taken fields.



Unlike the lookup table browse screens, the screens used to browse the main files have more options. For example, right click on a cell (intersection of a column and row in a browse screen) and a menu like the one below will pop up. Many of the options are the same as you can access by clicking a button (Insert, Change, Delete for example) however, other options like filtering on the contents of a cell are included.

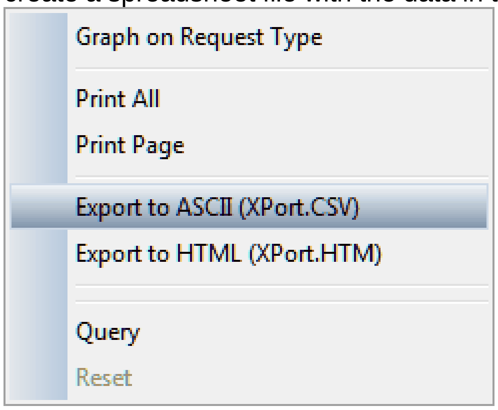




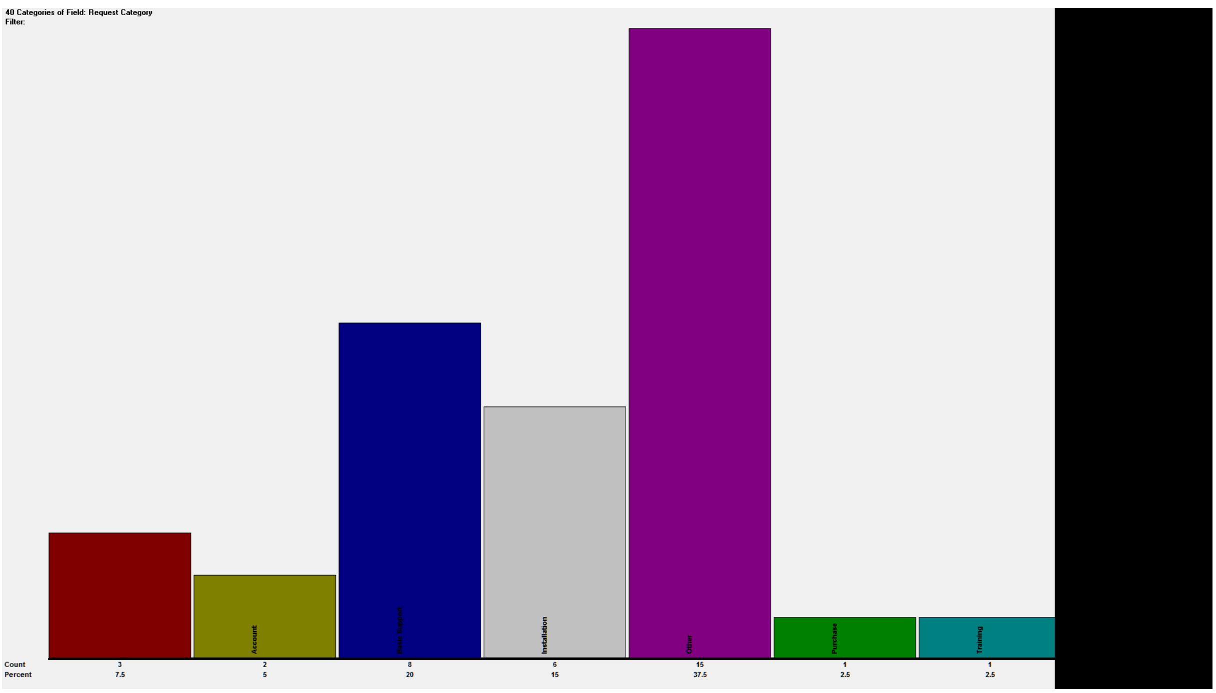
(NOTE:

Filtering on date and time items will not work.)

The menu option for Output is shown below. Most frequently you will use Export to CSV to quickly create a spreadsheet file with the data in the browse screen.



Sometimes a quick Graph (Bar Chart) can be helpful. Choose this option and Output to send the graph to the clipboard for pasting in a document.



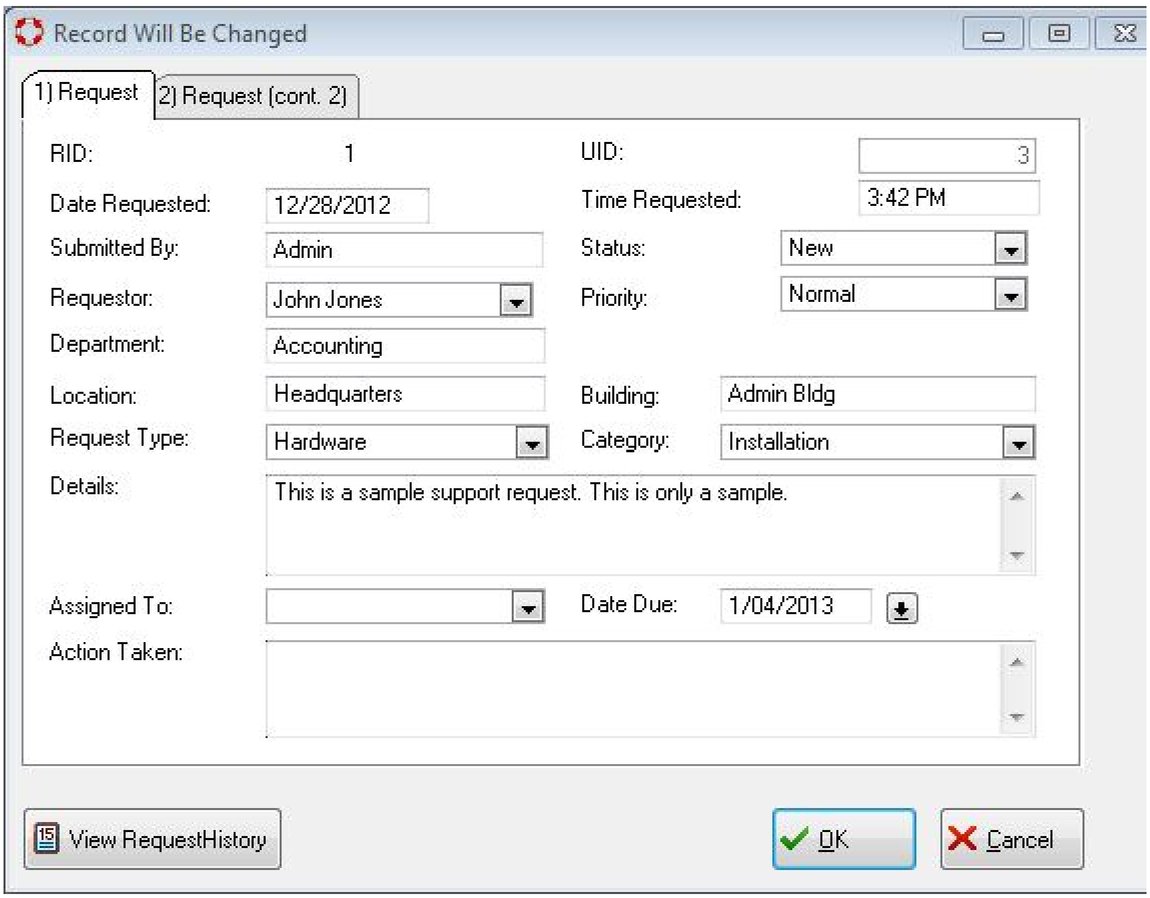
2.3.2 Update Requests

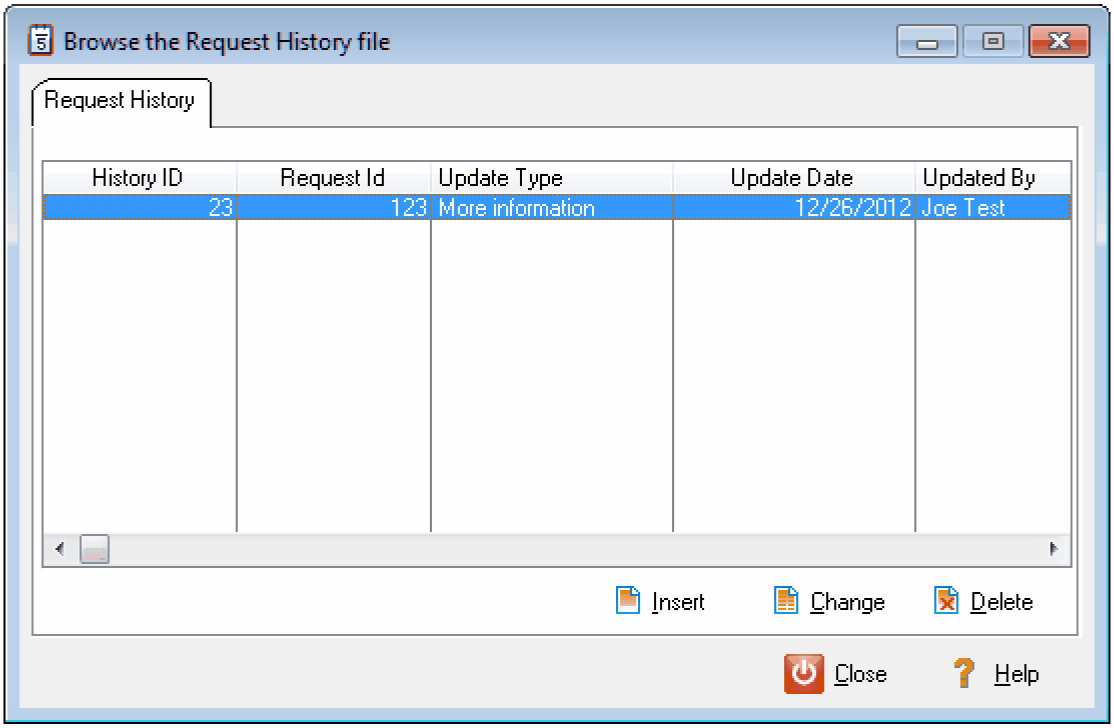
The first 2 fields on the Requests update screen are read only. The RID field is a numeric field increased with each request added. The UID is a unique number field associated with each user - when you select the Requester's name from the drop down list the related UID will be populated, as well as the Department, Location and Building. The Date Requested will be filled in as you add new records with the current system date and the Request Time will be filled with the current system time.

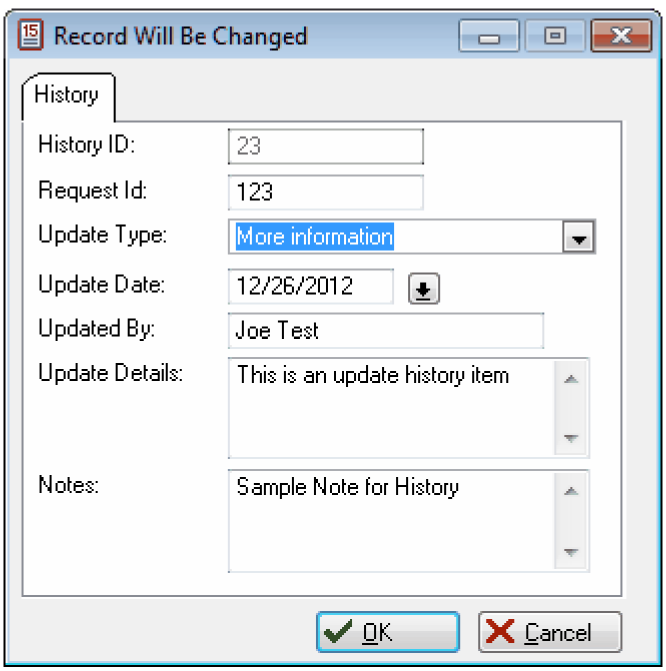
The Status field will be set to a default value of New and Priority will be set to Normal. The program was defined to make it quick and easy to record new requests and update existing requests. Drop down list boxes are provided for quickly choosing the Request Type and Request Category. A large box is provided for entering the Details of the request. If more information needs to be entered than will fit in the box a vertical scroll bar will be activated so you can keep typing.

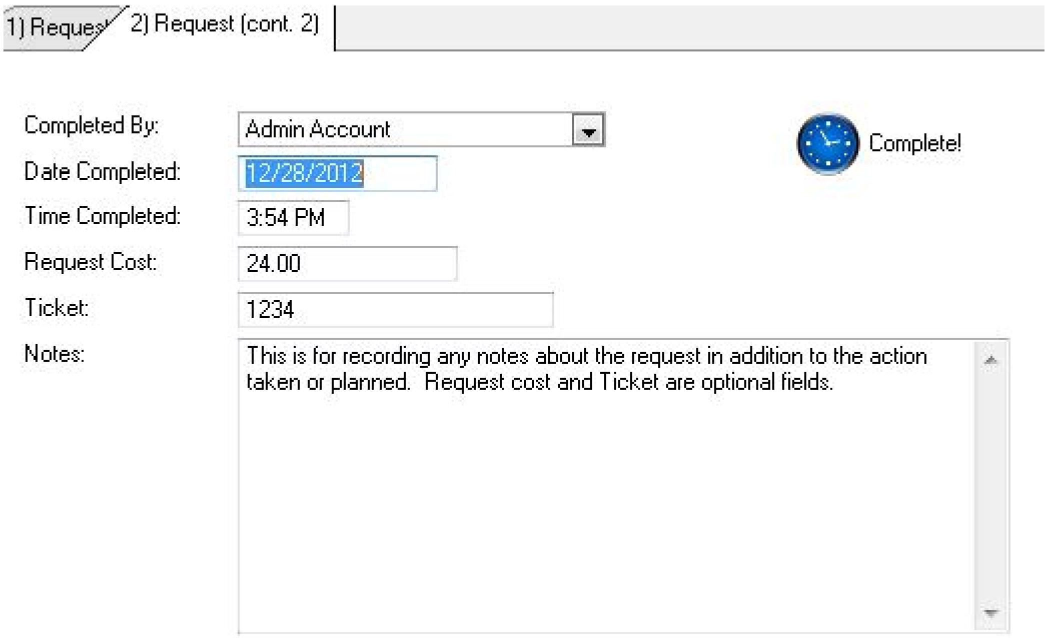
A drop down list box is provided to select the person Assigned To the request (this is used on the next tab). Another large box is provided for entering the Action Taken or planned. An optional Due Date can be entered or selected using the drop down date picker.

Before going to the second tab notice the button for Request History. Some organizations may find it helpful to track follow up or other actions related to a request. Clicking the Request History button will let you view any history that has been recorded or add new request history items.



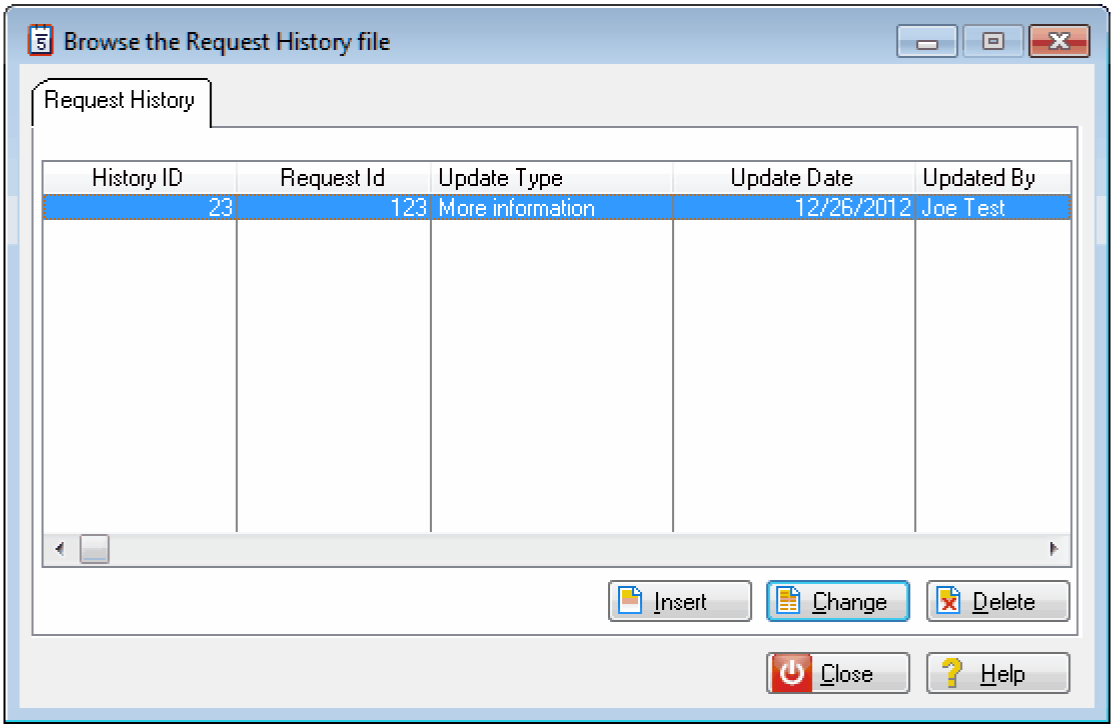

Browse the Request History file
Request History
History ID
Request Id
Update Type
Update Date
Updated By
23
123
More information
12/26/2012
Joe Test
Insert
Change
Delete
Close
Help


Record Will Be Changed
History
History ID:
23
Request Id:
123
Update Type:
More information
Update Date:
12/26/2012
Updated By:
Joe Test
Update Details:
This is an update history item
Notes:
Sample Note for History
OK
Cancel



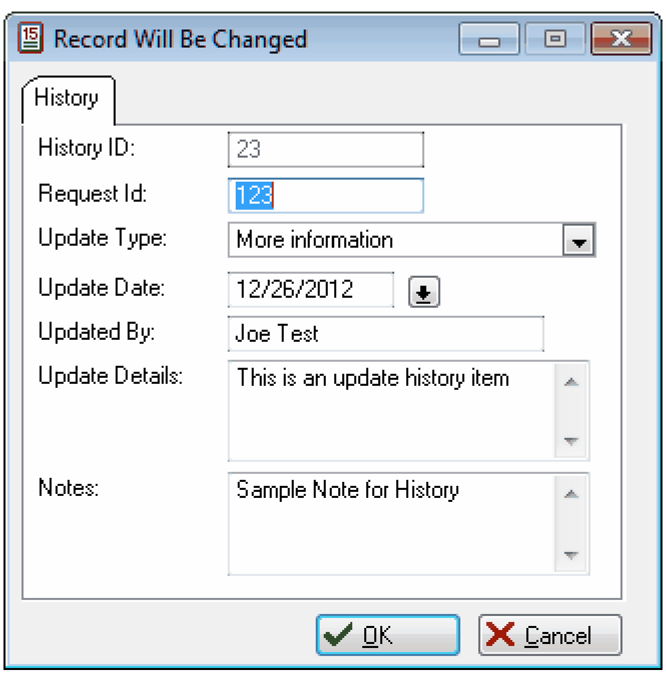
The second tab is used when you have finished resolving a support request. The drop down list will let you select the person completing the request. TIP: If you have already assigned someone to the request when you click the Clock Icon labeled Complete! that value will be used to instantly fill in the Completed By value, the current date will fill in the Date Completed and the current time will be used to fill in the Time Completed. So clicking one button can fill in three values quickly. You can also enter a Request Cost, a Ticket Number and any Notes about the request.

2.3.3 Browse Request History



This screen is used to view related request history items for a selected support request.

2.3.4 Update Request History



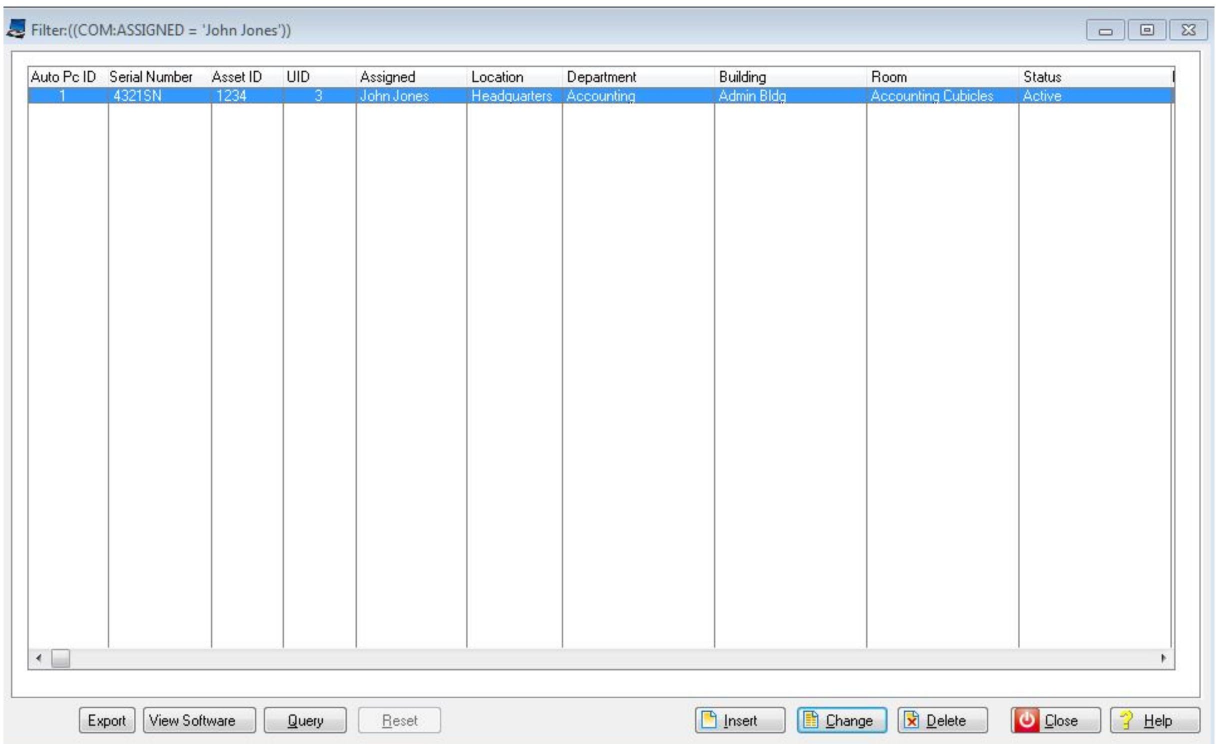
This screen is used to add or update request history records. The History ID field is automatically created as you add new records. The Request ID refers to the related (parent) Support Request record. You can select the type of Update (more information, escalation, follow up, etc.). You can use the drop down calendar to enter the date of the request history update. Optionally enter the name of the person entering the request history item. The last two large boxes are for recording the details of the item and any additional notes.

2.4 Computer Inventory

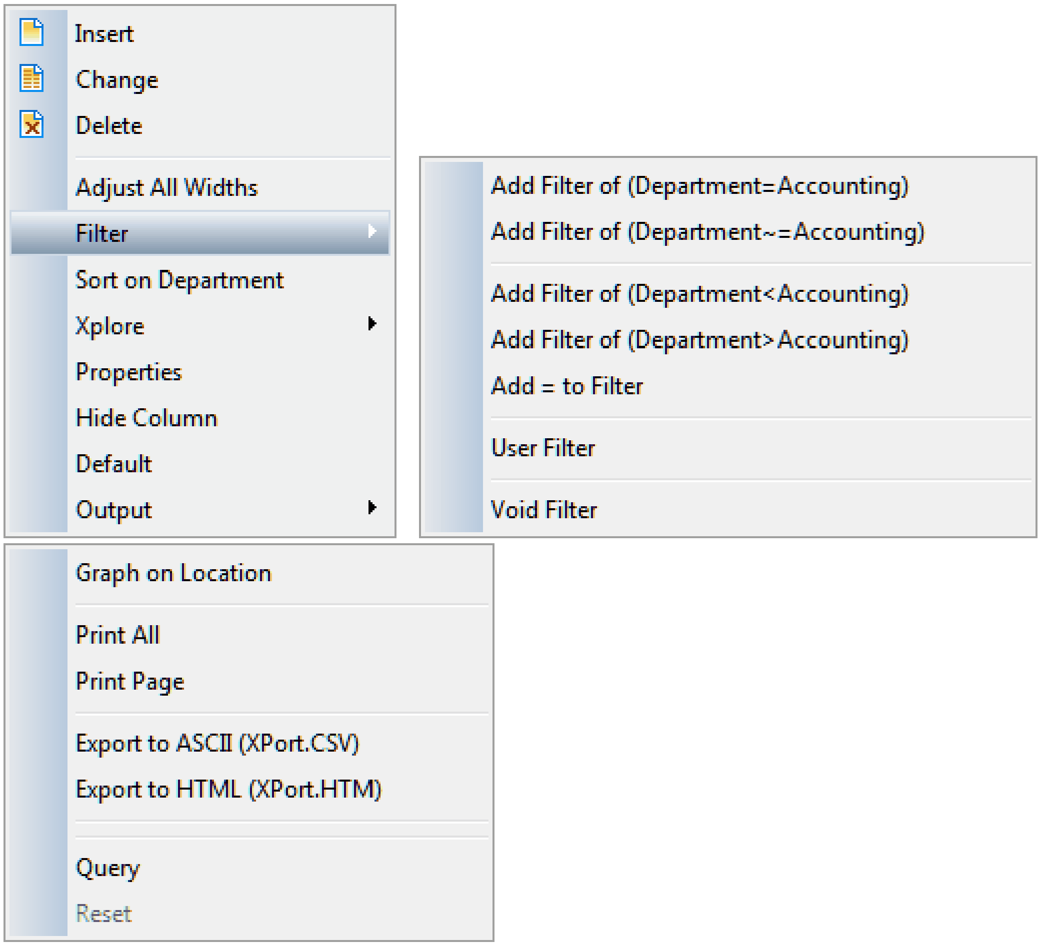
AccessAble Help Desk allows you to record, update, search and report on computers.

2.4.1 Browse Computers

This screen displays Computer inventory records in rows and columns like a spreadsheet. In addition to the button for the related "child" software records a button is provided to let you quickly export computer information, a Query (and if a query is active) and Reset button for using the Query Wizard, as well as the buttons for Creating (inserting), Changing or Deleting computer records. A Close and Help button is also on this screen.



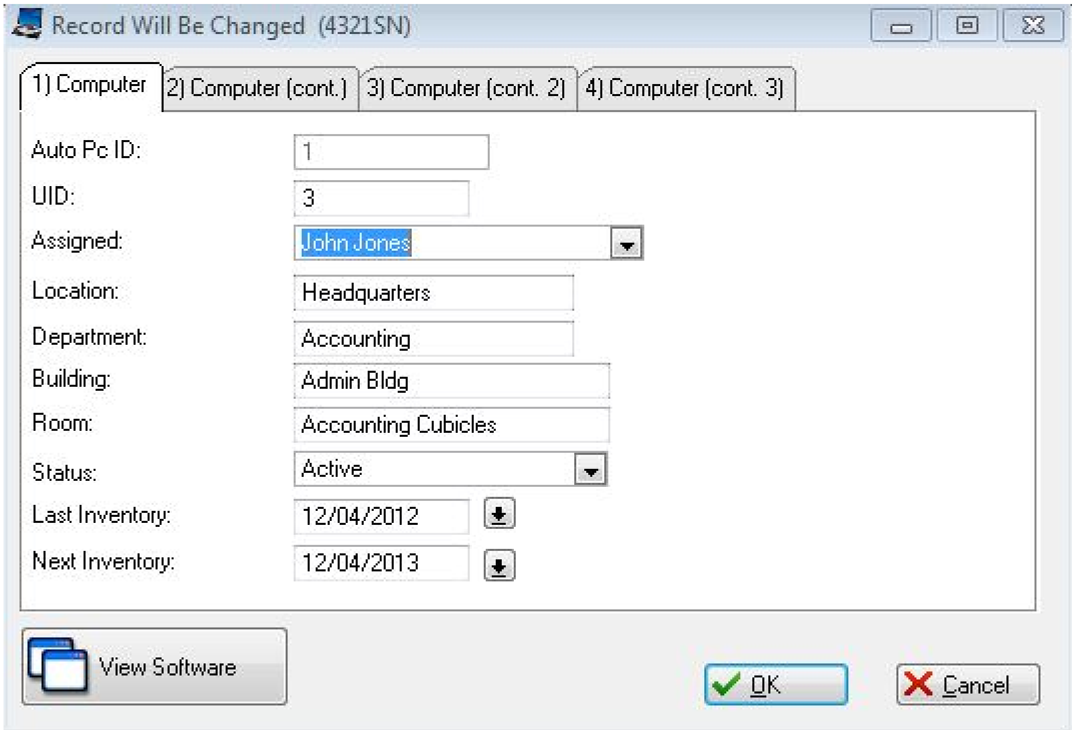
There are a number of options available when you right click in a cell or on a column.



2.4.2 Update Computers

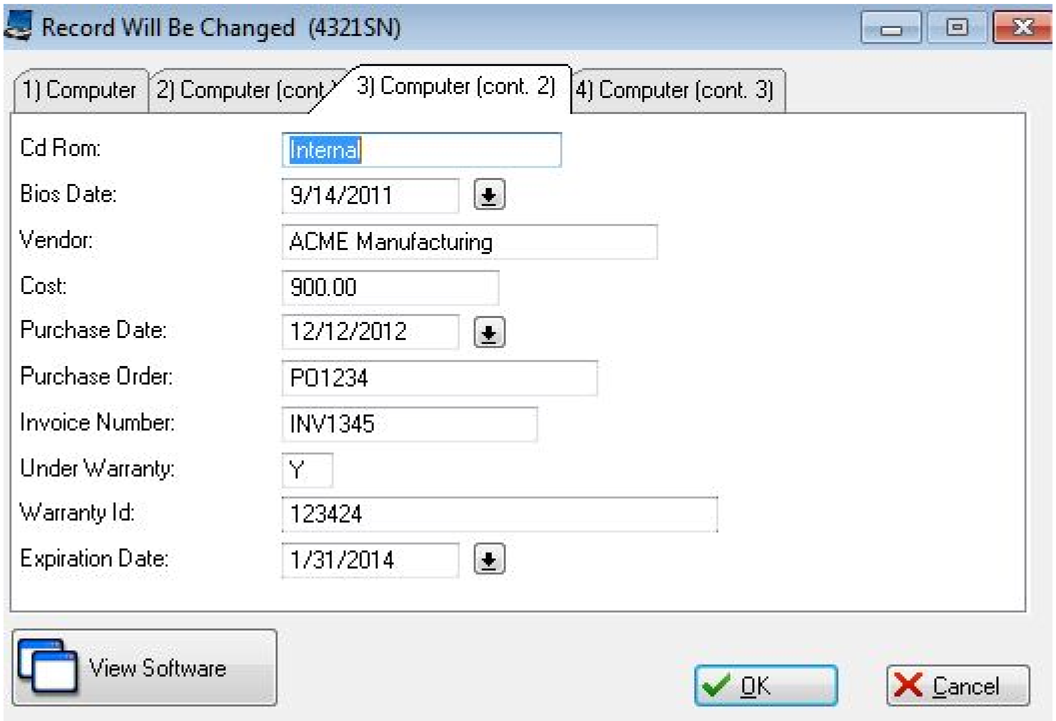
This screen is used to Add or Change records about computers in the inventory. There are four notebook style tabs on this screen. Let's start with the A unique ID (Auto PC ID) is automatically created when you add a new computer record. When you select the person assigned from the drop down list, the UID, Location, Department, Building and Room number fields are all automatically looked up from the related User record. Next select the Computer status from the drop down list box. This is populated from the Equipment Status lookup table.

Drop down date pickers let you quickly enter an optional date for the last and next inventory of the computer.

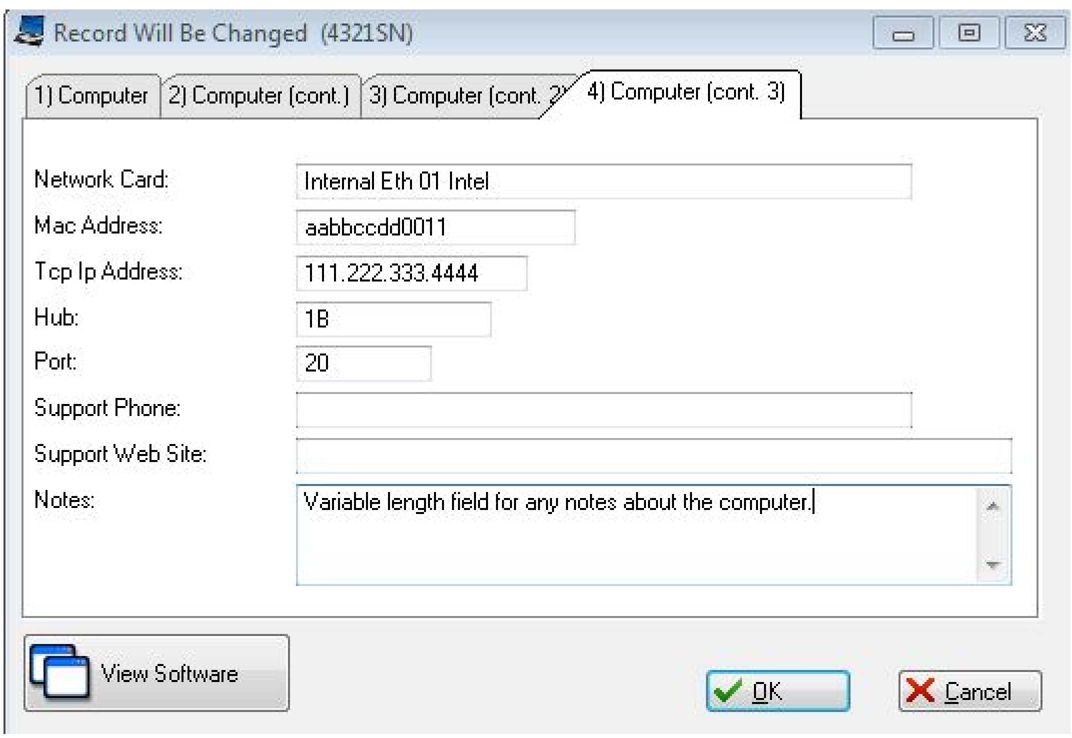


The next tab starts with an Asset ID and Serial Number fields - these should be unique. Drop down list boxes are provided to quickly enter the Manufacturer, Model and Operating Systems. You can then enter the OS version, CPU Type and CPU Speed and the amount of RAM and size of the hard disk

The third tab will let you enter information about the CD Rom (internal, external, etc.), select or enter the Bios Date, choose the Vendor from the drop down list and enter the cost of the computer. You can also record the date of the purchase, Purchase Order and Invoice Number and Warranty Information, including the warranty expiration date.



The final tab allows you to enter information about the network card, MAC and IP address as well as Hub and Port. You can also enter a phone number and web site for support related to the Computer and any additional Notes you may want to record.

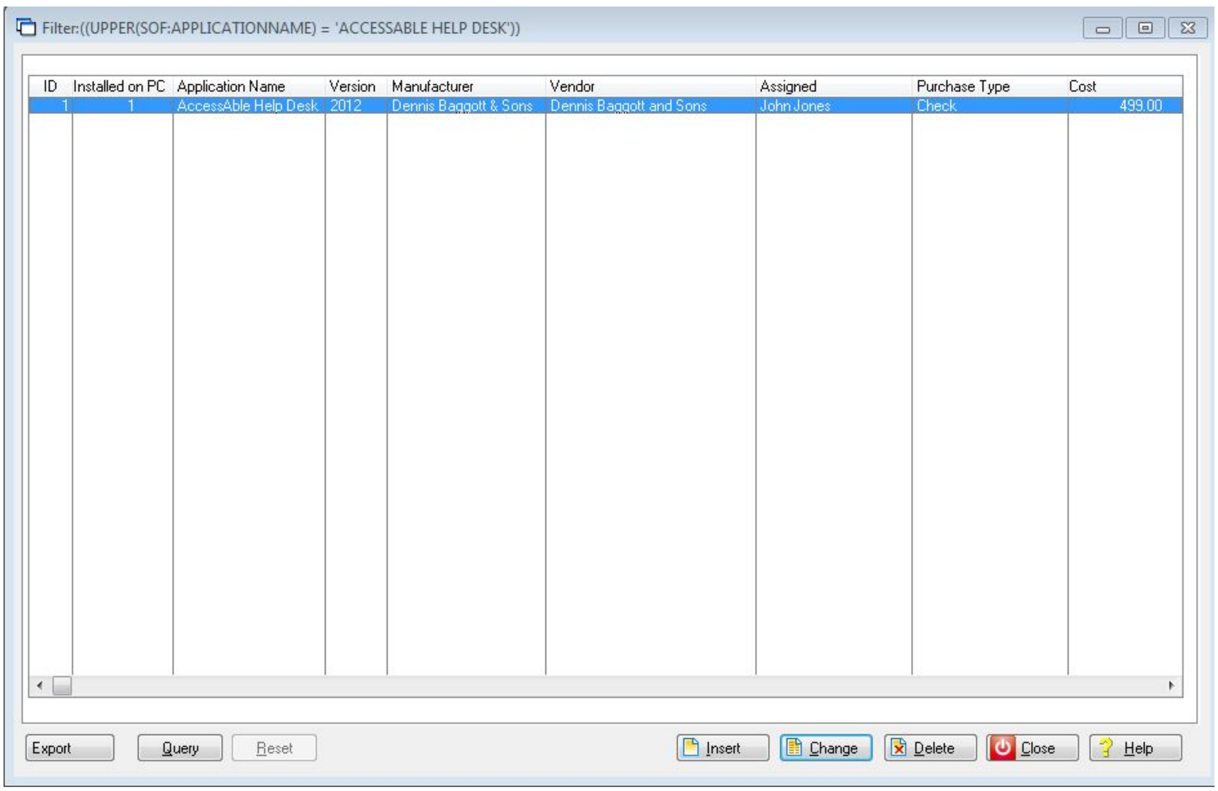


2.5 Software Inventory

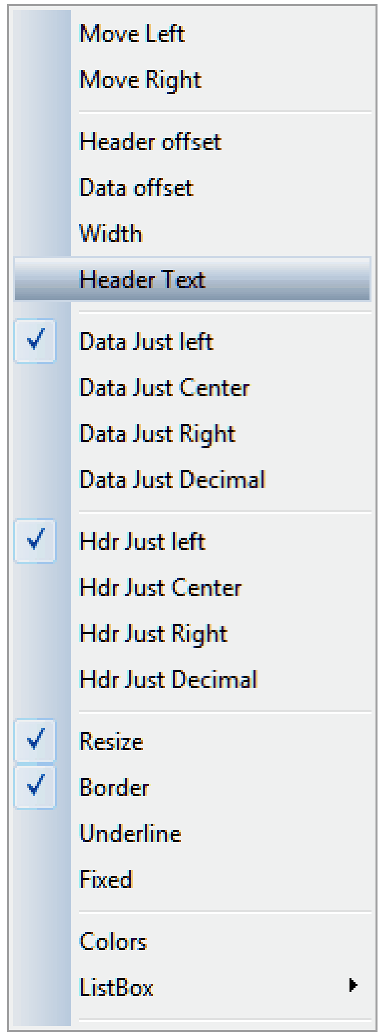
AccessAble Help Desk 2012 let's you record information about computers and peripherals as well as software inventory.

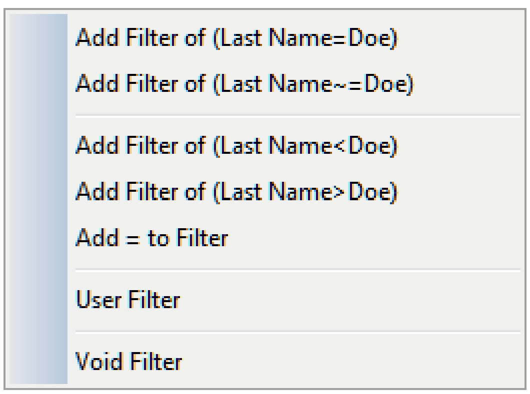
2.5.1 Browse Software

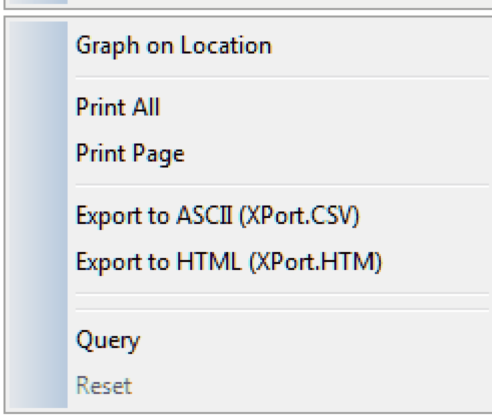
This screen is used to view software in your organization. Unlike the lookup table browse screens, the screens used to browse the main files have more options. A button is provided to let you quickly export software information, a Query (and if a query is active) and Reset button for using the Query Wizard, as well as the buttons for Creating (inserting), Changing or Deleting software records. A Close and Help button is also on this screen.



For example, right click on a cell (intersection of a column and row in a browse screen) and a menu like the one below will pop up. Many of the options are the same as you can access by clicking a button (Insert, Change, Delete for example) however, other options like filtering on the contents of a cell are included.



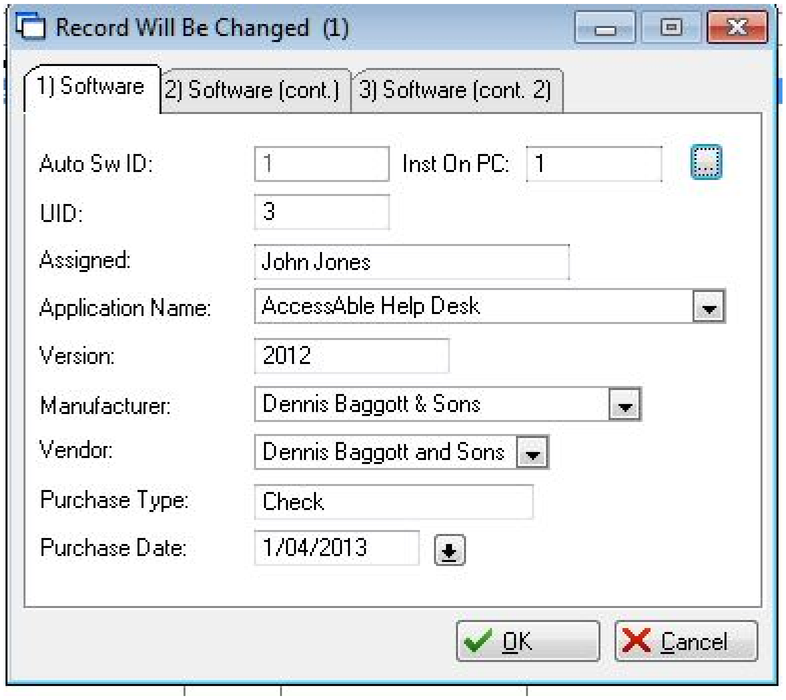




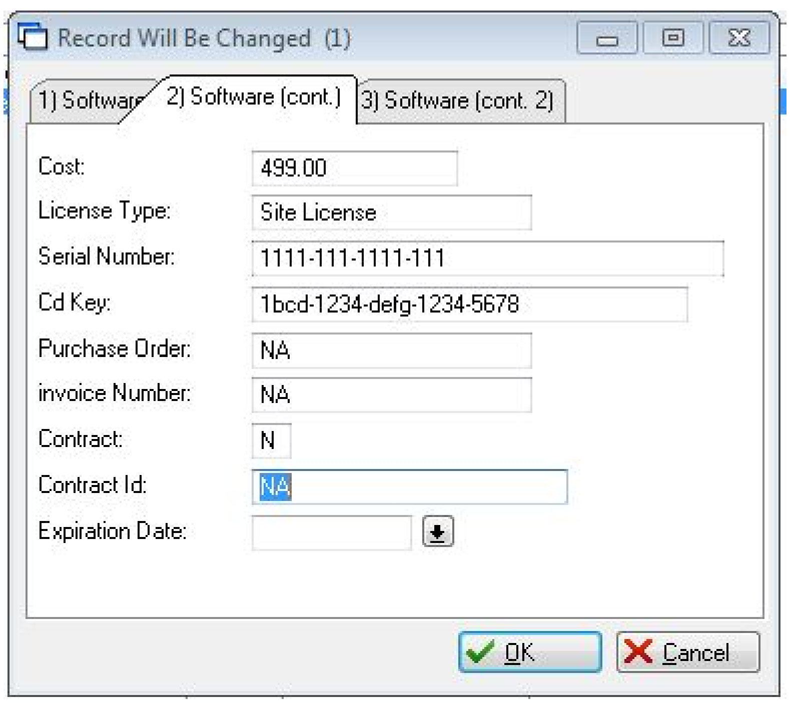
2.5.2 Update Software

The screen used to add and change software records consists of 3 notebook style tabs. The Auto SW ID field is automatically incremented with each software record you add. Click the button next to the Inst on PC to select the Computer the software is installed on and the UID and Assigned To fields will be entered for you. Next choose the name of the application from the drop down list (or begin typing to add a new Application name to the lookup table). You can then enter the version number. Select the Manufacturer and Vendor names from the drop down list boxes. You may then enter the

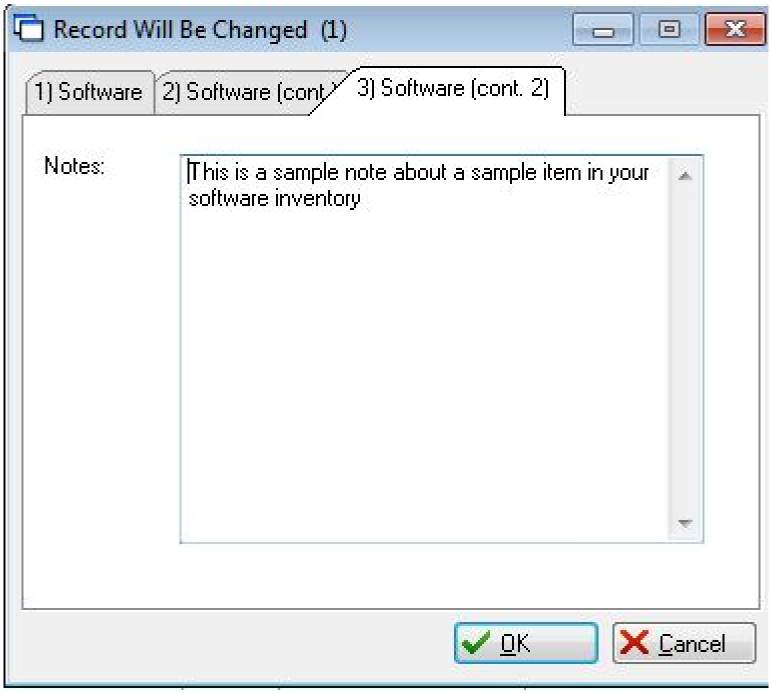
Purchase Type (lease, cash, etc) and type the date purchased or click the down arrow to use the date picker pop up.



The second tab allows you places to enter the cost of the software, the license type, as well as a Serial Number and CD Key. You may also enter a Purchase Order and Invoice number as well as Contract information.



The third tab lets you enter any additional notes in free format.

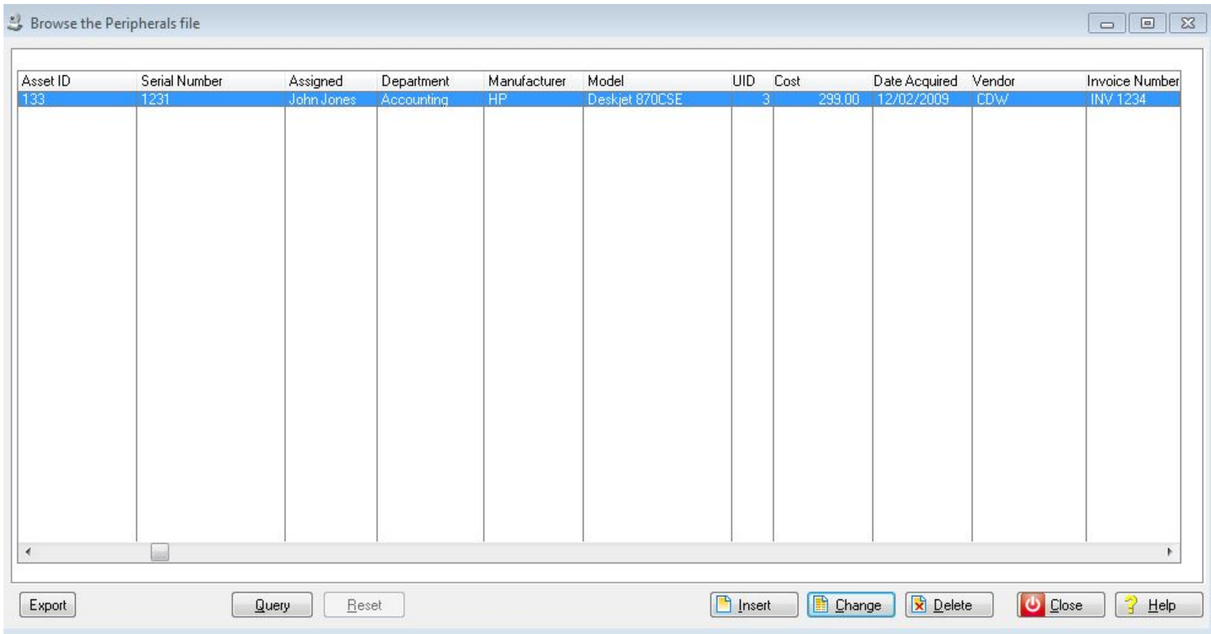


2.6 Peripherals

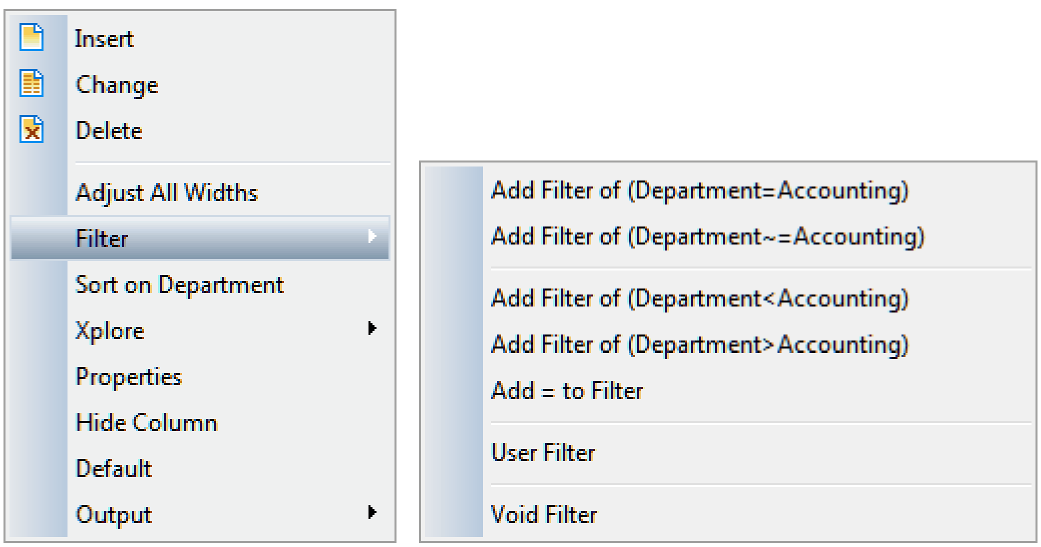
In addition to allowing for the inventory of computers, AccessAble Help Desk provides for recording, updating and reporting on peripherals.

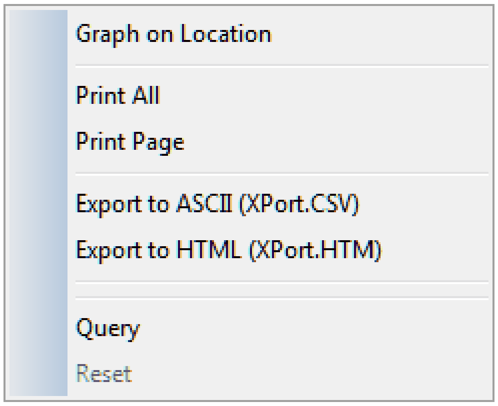
2.6.1 Browse Peripherals

This screen is used to view information about Peripherals in your inventory. A button is provided to let you quickly export peripheral information, a Query (and if a query is active) and Reset button for using the Query Wizard, as well as the buttons for Creating (inserting), Changing or Deleting peripheral records. A Close and Help button is also on this screen.



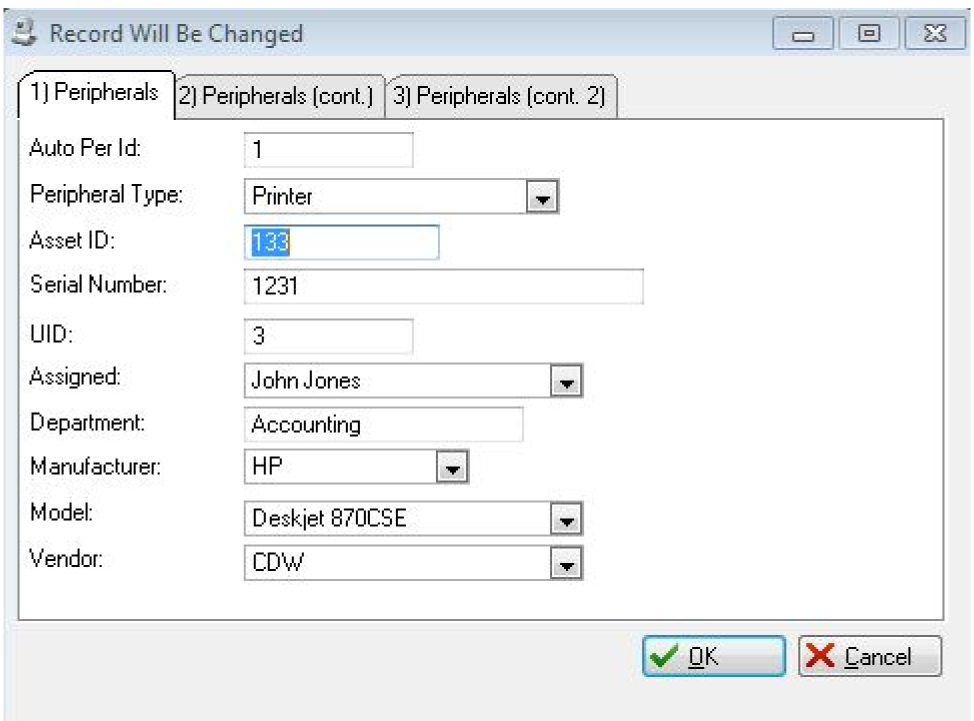
There are a number of options available when you right click in a cell or on a column. Many of the options are the same as you can access by clicking a button (Insert, Change, Delete for example) however, other options like filtering on the contents of a cell are included.



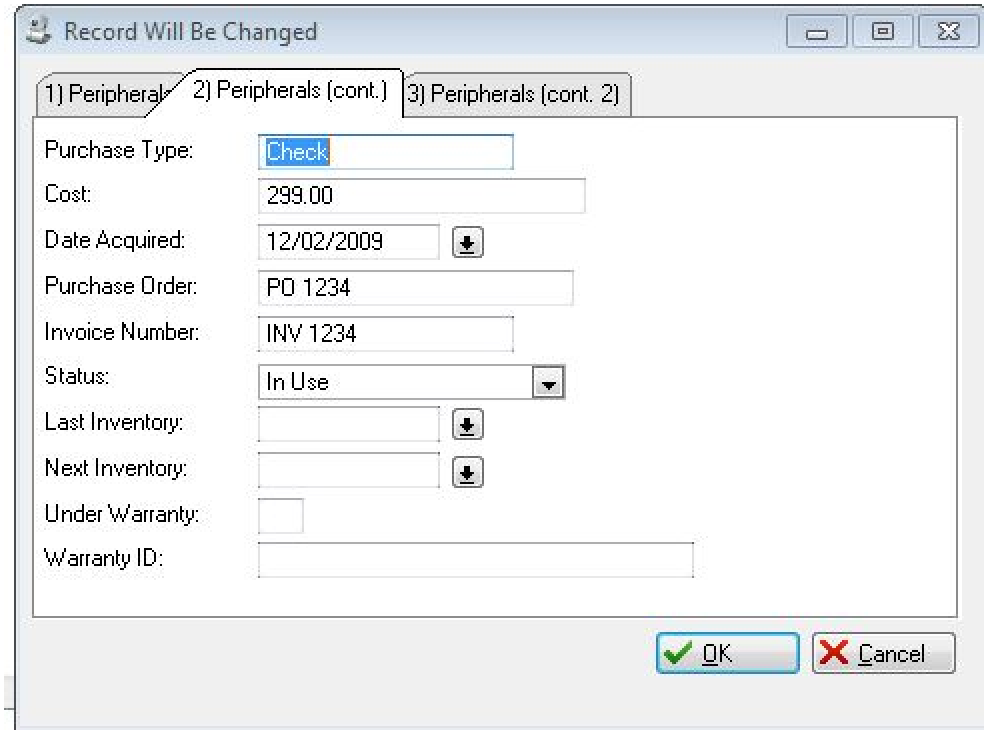


2.6.2 Update Peripherals

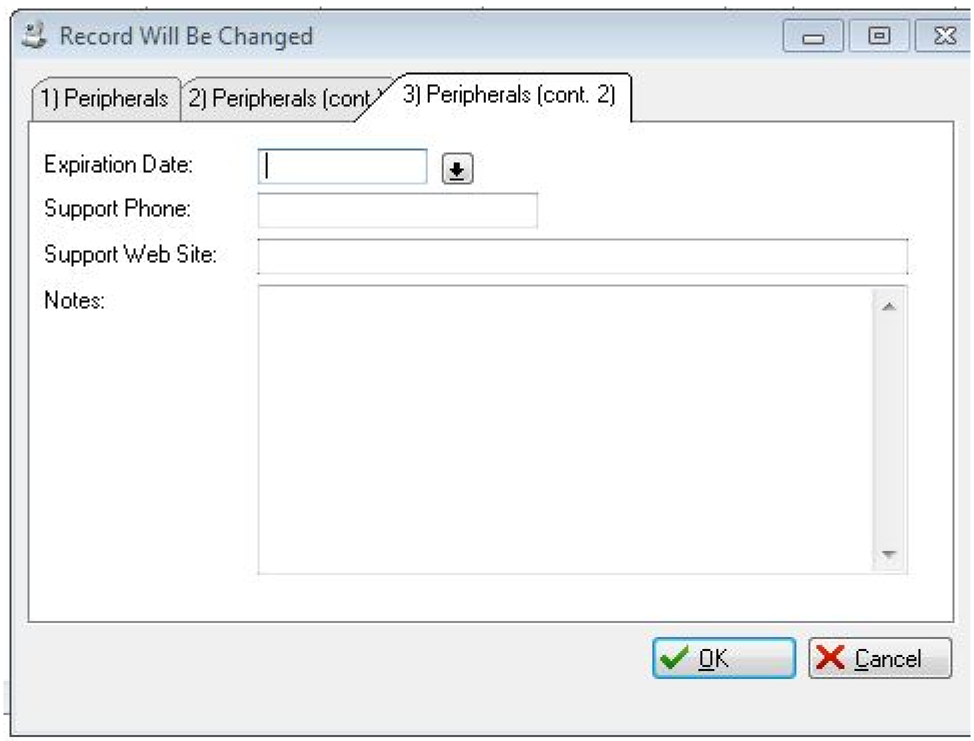
This screen is used to add or edit Peripheral Details. Like many update screens, drop down list boxes that get data from lookup tables are used to speed data entry and insure consistent data entry. Ale when a value for the Assigned user is selected from that drop down list other values are automatically looked up and filled in from the related table



There are three notebook style tabs for this screen. Date fields can be easily completed by clicking the button with an arrow to use a calendar date picker.



A variable length Notes field is provided for free form entry of data about the item.

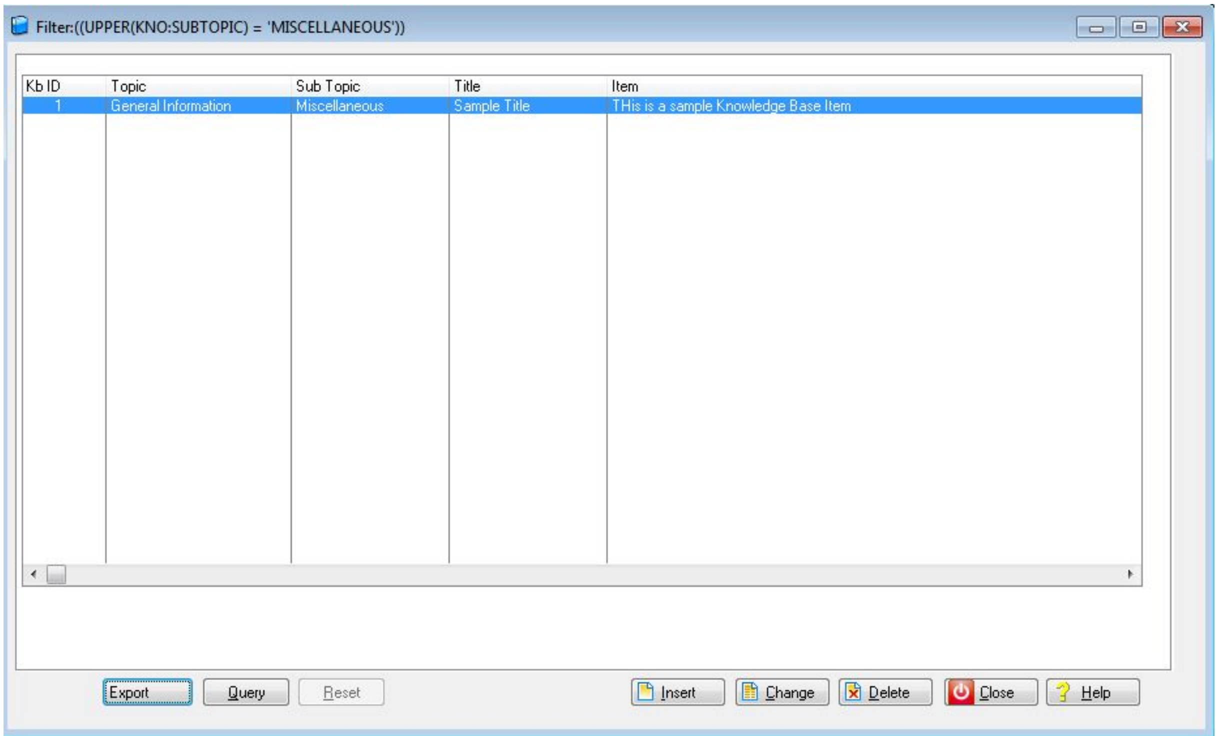


2.7 Knowledge Base

AccessAble Help Desk let's you create, maintain, search and report on a knowledge base you accumulate as you update support requests.

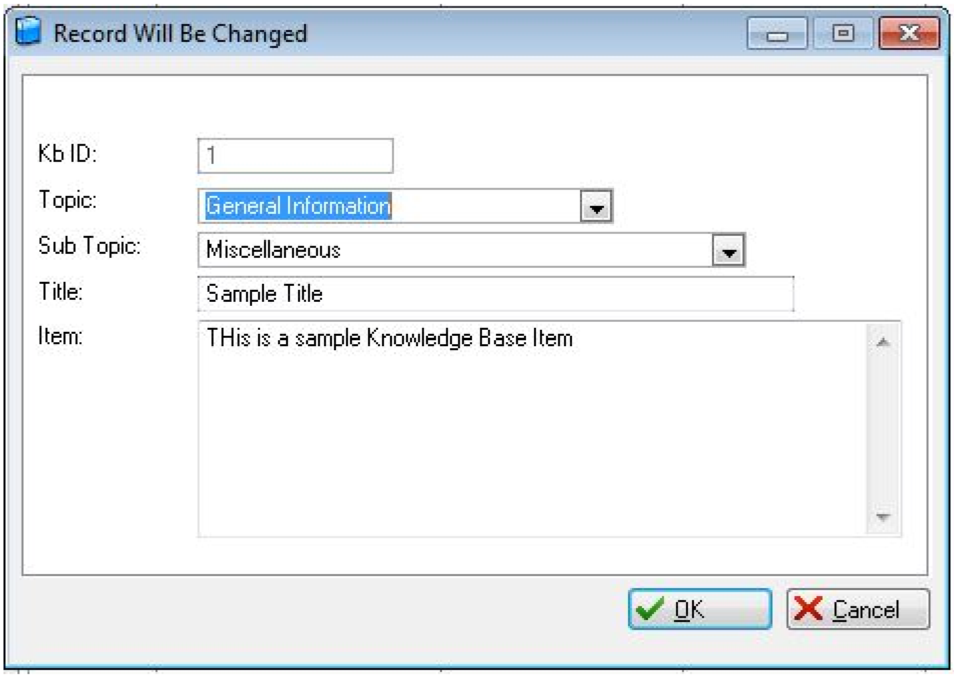
2.7.1 Browse Knowledge Base

This screen shows the Knowledge Base items in a list style view. An Export button is provided to let you quickly output the data as filtered and sorted. A Query button will let you use the Query Wizard to search your data and buttons are provided to let you Insert (Add), Change or Delete records. A Close button will let you close the screen and a Help button provides context sensitive.



2.7.2 Update Knowledge Base

This screen is used to update Knowledge Base Items. A KB ID will be added automatically for each new record. Select the Topic from the drop down list (populated from the Topics Lookup Table), then choose a Sub Topic from the next drop down list (populated from the Sub Topics Lookup Table) or type a new value in the drop down list to add an item on the fly. Next, enter a Title for the Item. Finally, enter the knowledge base item and click OK to save the record.



3 Lookup Tables

A number of lookup tables are provided. This is to speed data entry and to insure consistency of data values used in the main data files.

3.1 Browse Applications

This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen..

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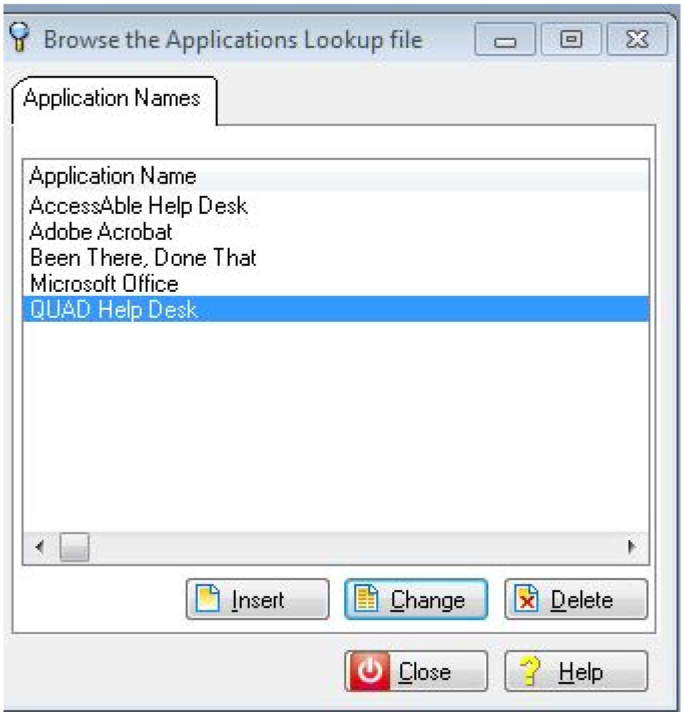


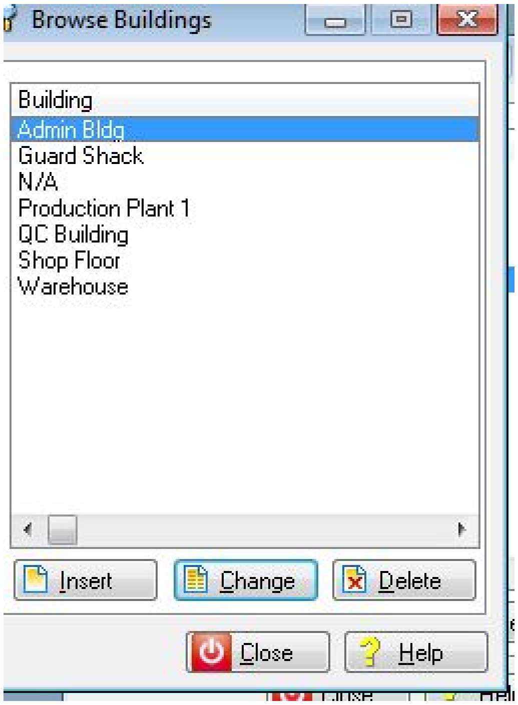
3.2 Update Applications

This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.

3.3 Browse Buildings

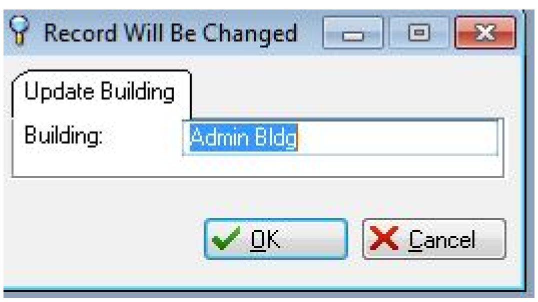
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



3.4 Update Buildings

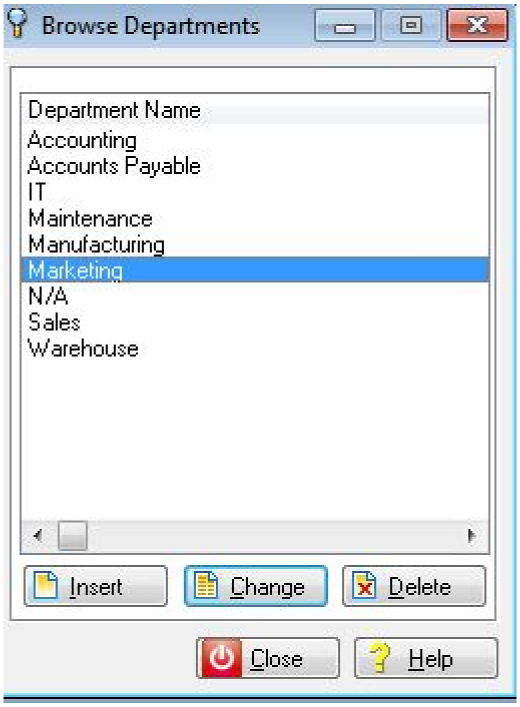
This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



3.5 Browse Departments

This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



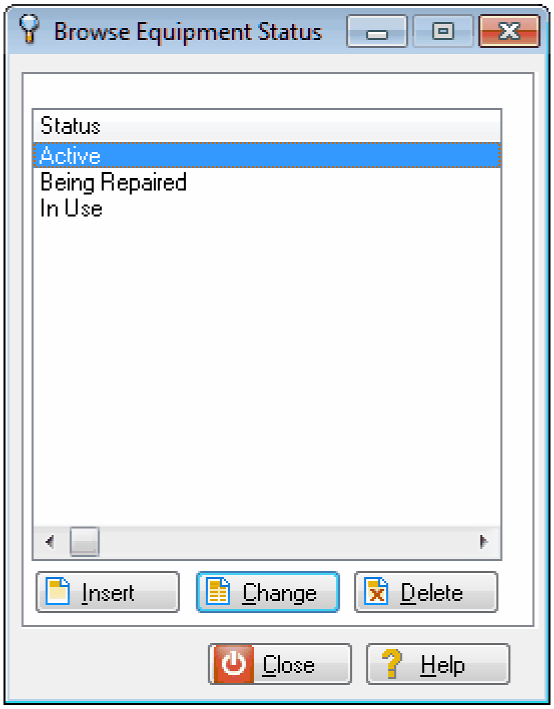
3.6 Update Departments

This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.

3.7 Browse Equipment Status

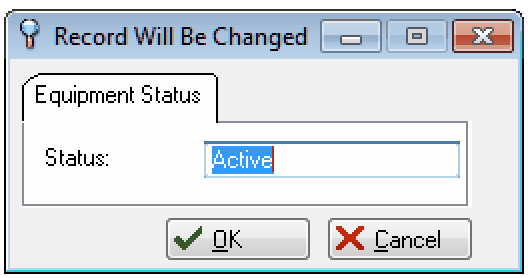
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



3.8 Update Equipment Status

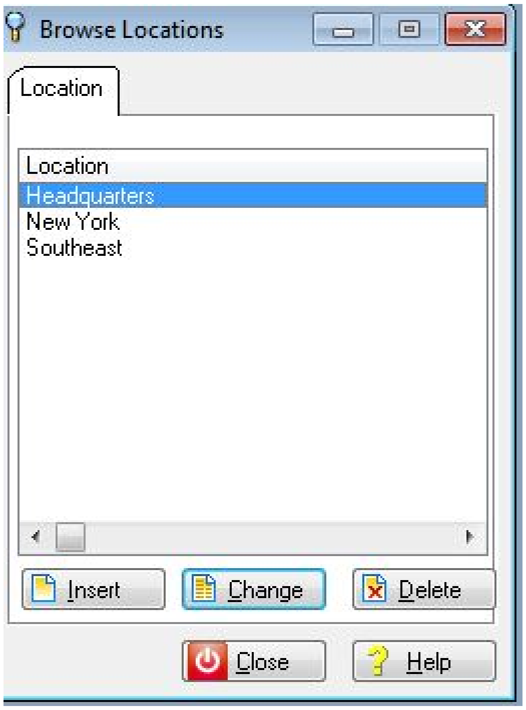
This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



3.9 Browse Locations

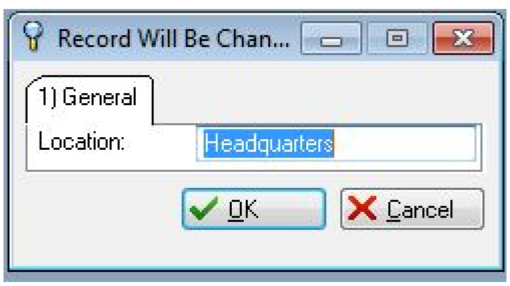
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



3.10 Update Locations

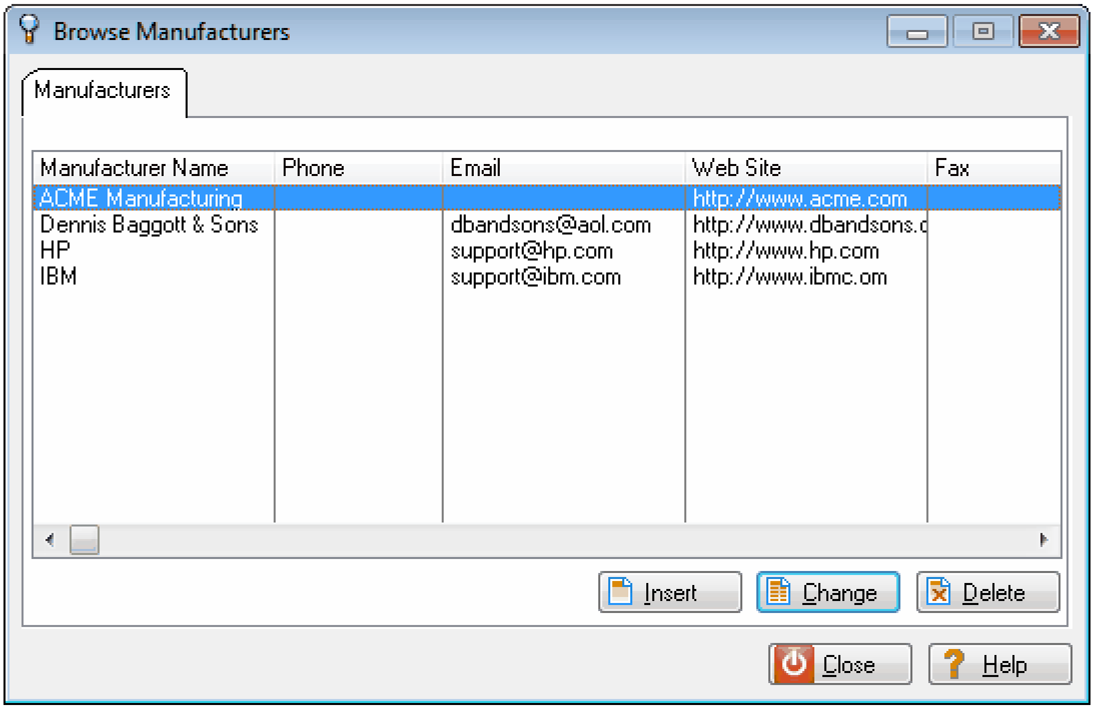
This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



3.11 Browse Manufacturers

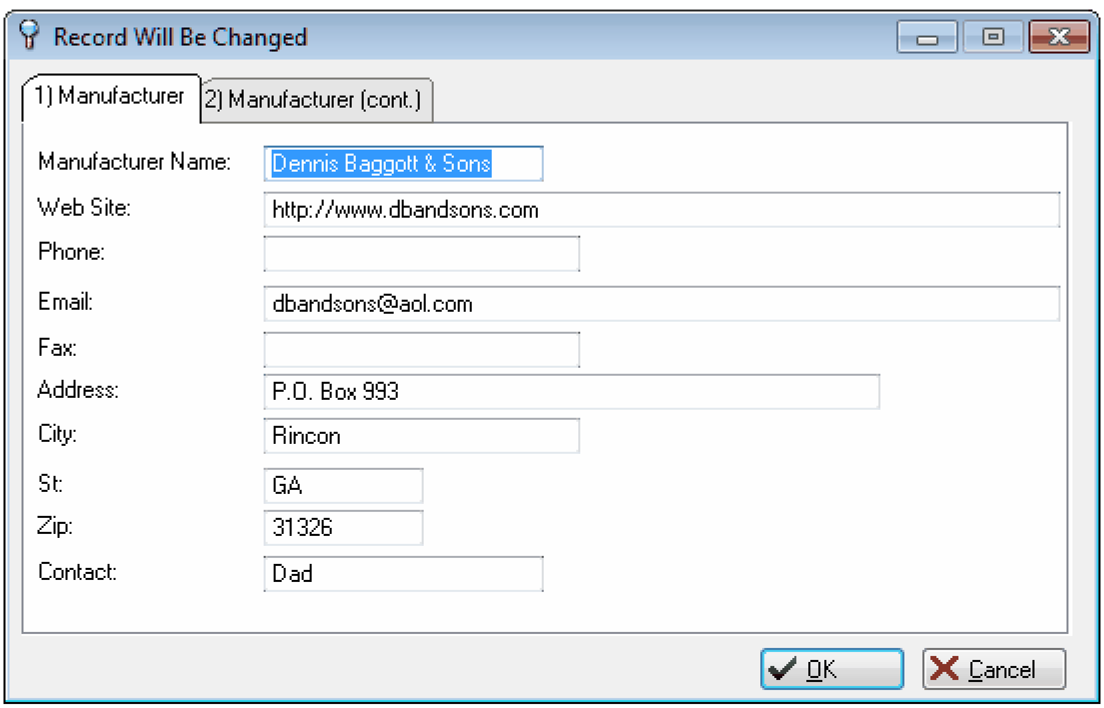
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.

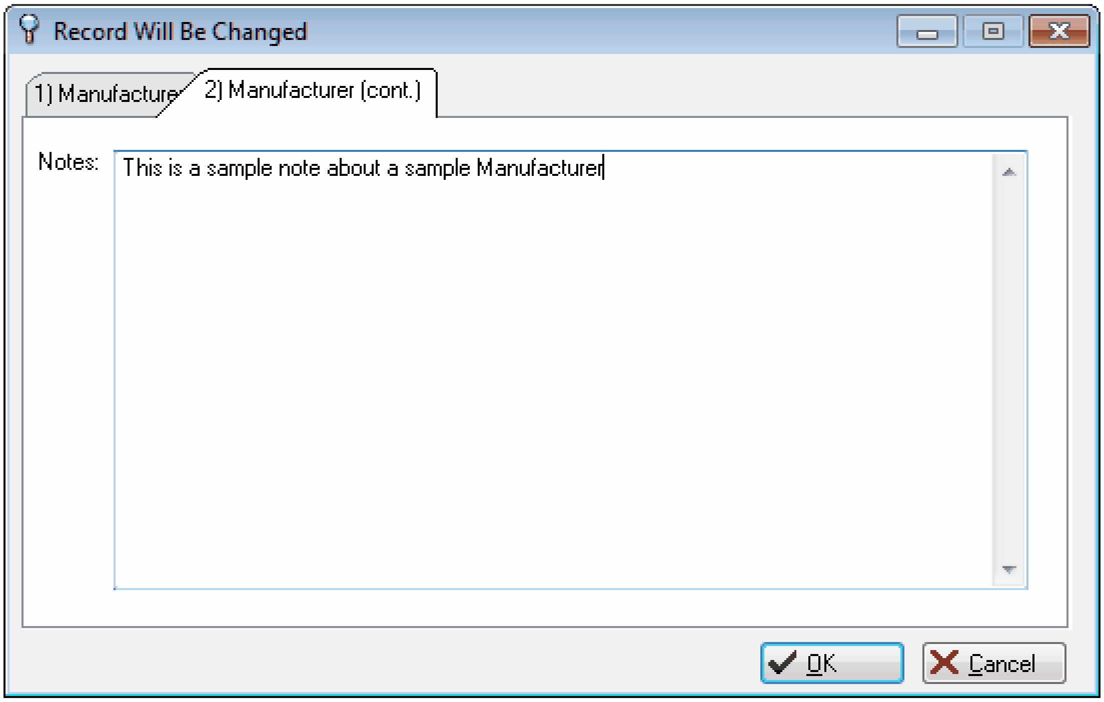


3.12 Update Manufacturers

This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



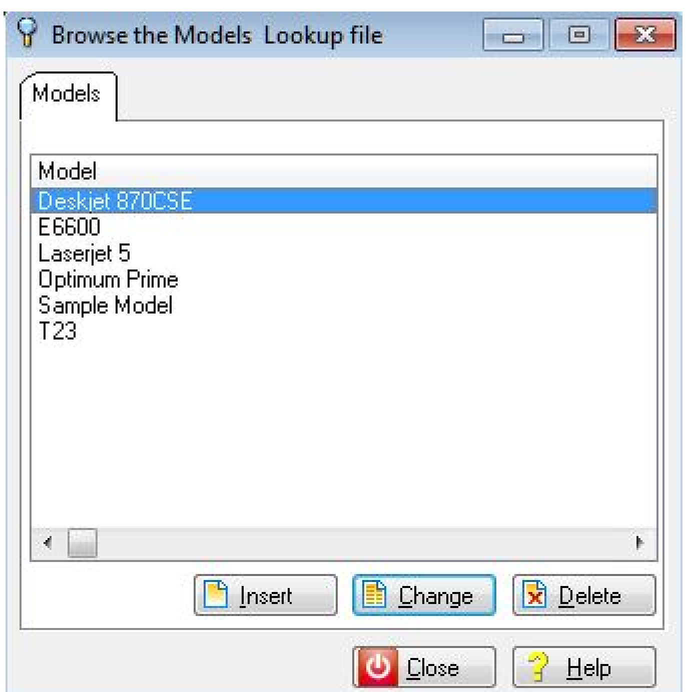
A variable length Notes field is provided for free form entry of data about the item.



3.13 Browse Models

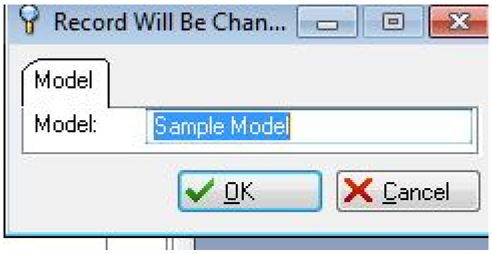
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



3.14 Update Models

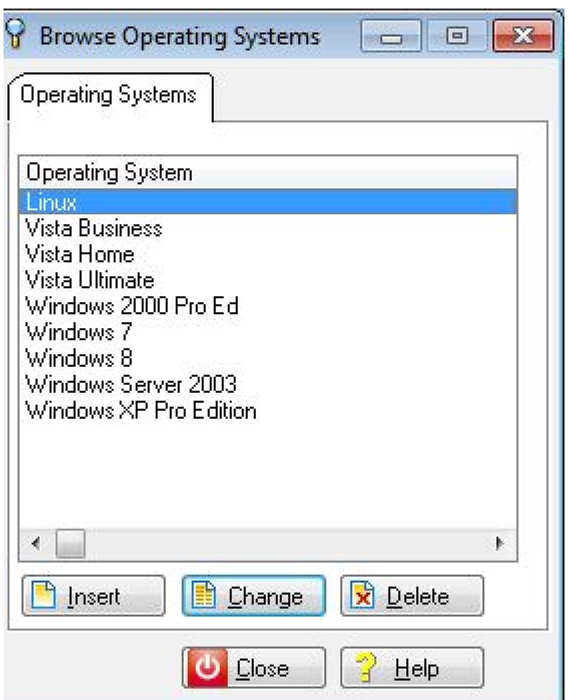
This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



3.15 Browse Operating Systems

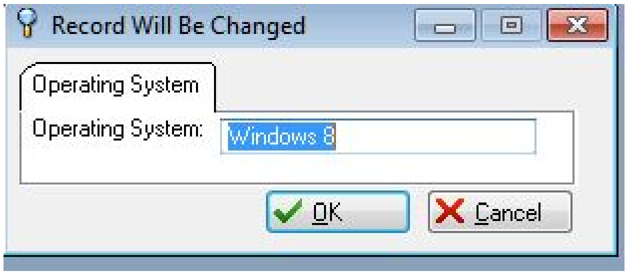
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.

Click the close button when finished with this screen or the Help button to view information about the screen.



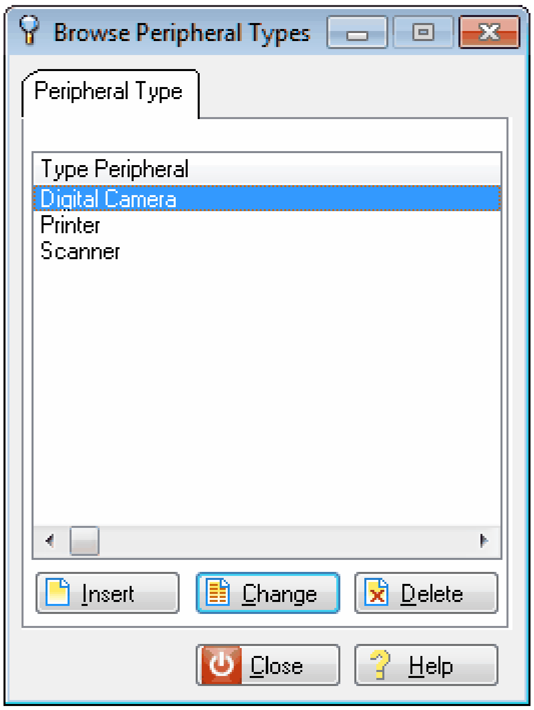
3.16 Update Operating Systems

This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.



3.17 Browse Peripheral Types

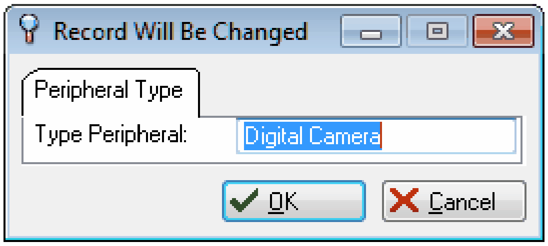
This screen provides a list of the values in the lookup table. Click the Insert button to Add a new item, the Change button to edit the selected item, or the Delete button to remove the selected item from the list of values.



Click the close button when finished with this screen or the Help button to view information about the screen.

3.18 Update Peripheral Types

This screen is used to Add a new value or change an Existing value. Just enter the data as appropriated and click the OK button to save the record, or click the Cancel button to close the screen without changing the record.

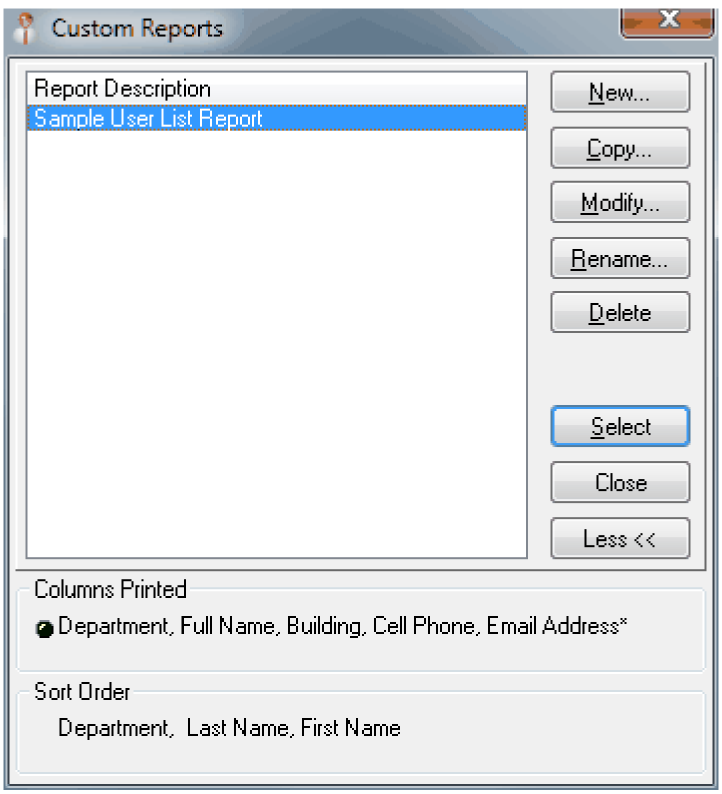


4 Reports

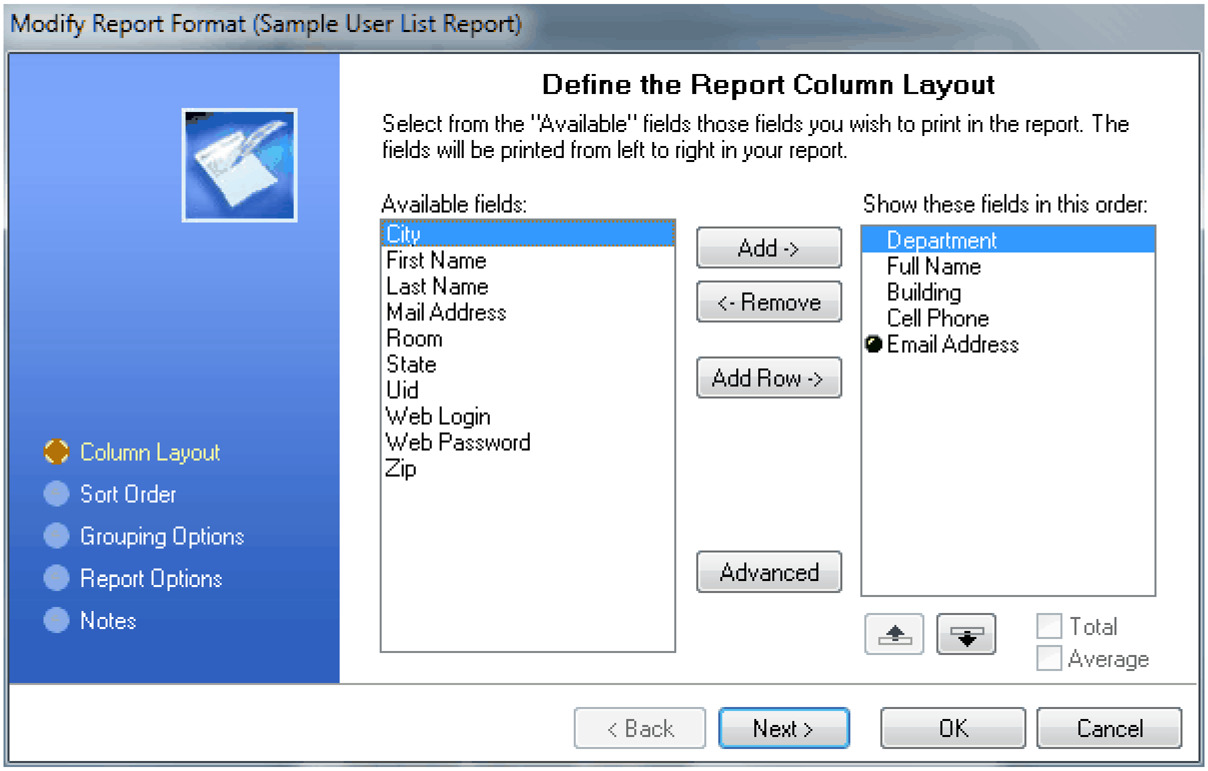
The desktop application for AccessAble Help Desk 2012 includes Report Wizards for generating reusable list style reports that can be filtered using the Query Wizard. A number of reports created with Crystal Reports (SAP Business Objects) are provided. You can edit these or create your own reports if you use Crystal Reports. A standalone Report Designer is provided to licensed users of AccessAble Help Desk 2012 via a separate download and setup routine.

4.1 Report Wizard Report

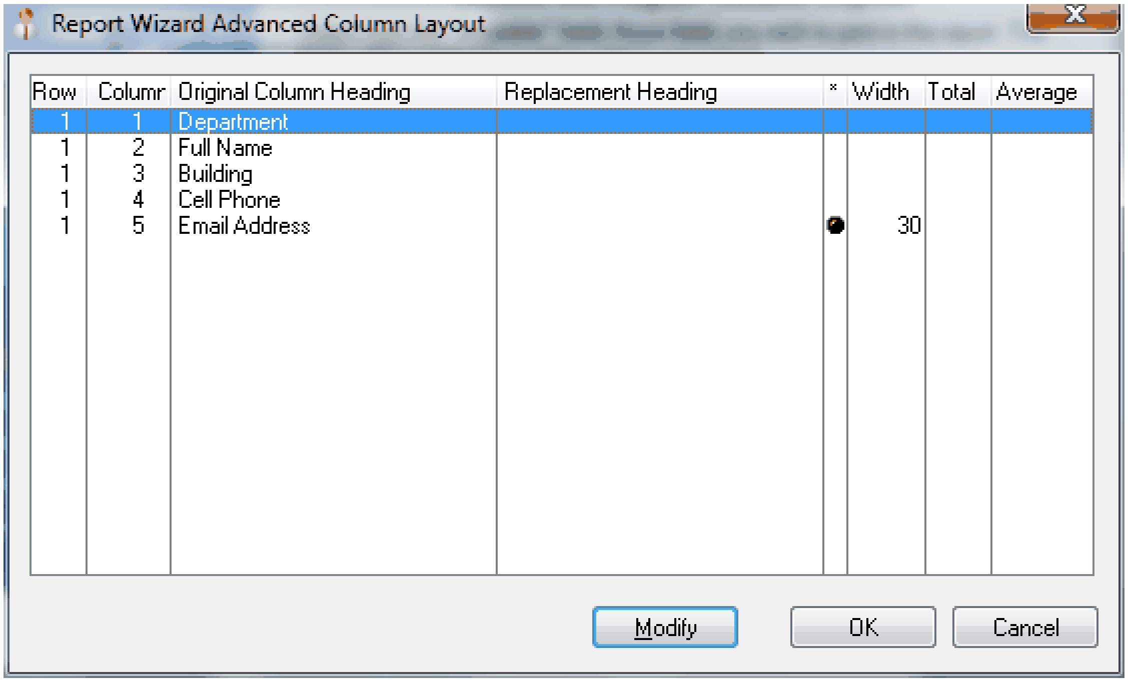
When you choose one of the report wizards you will first see a list like the one below where you can choose an existing report to modify, copy, print or to create a new report.



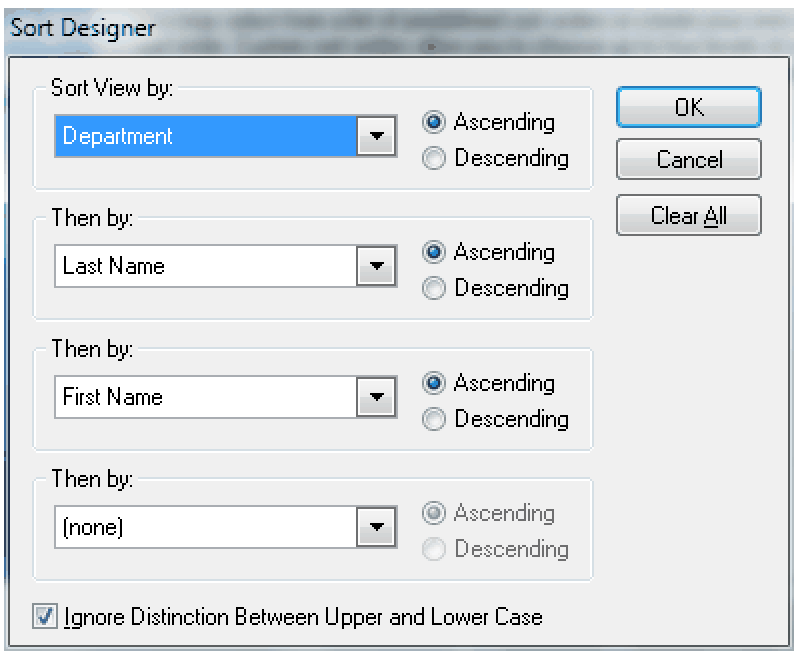
The first step is to choose the fields to be printed on the report.



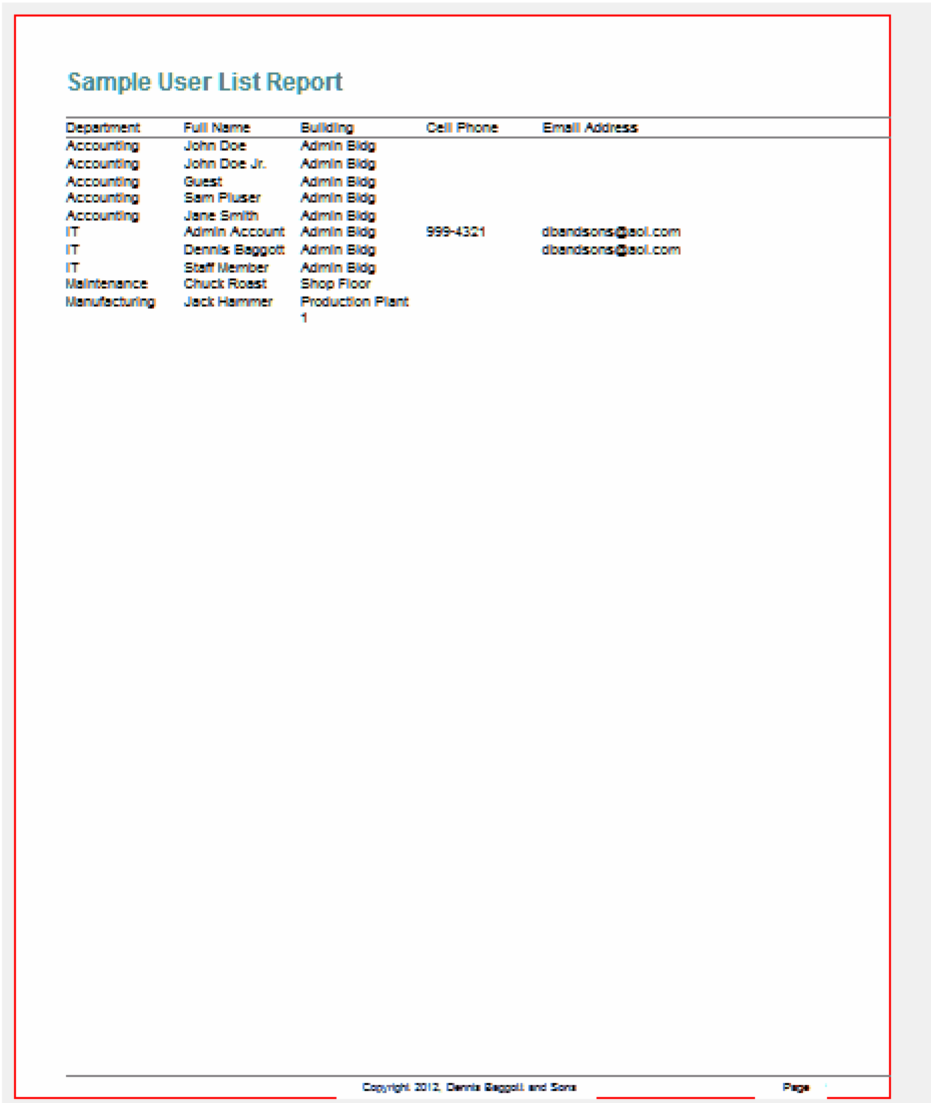
I just click on a field on the left ad click the Add button. If I have too many fields to print on a single row, even in landscape mode, I can click the Add Row button and add fields to another row. In this example one row is enough.
You could also specify a column width. In the example above I made the width for the email address field 30 characters long. You can change font for a column heading as well as the column data. You can apply Bold to the Column Heading, Data and the Total/Average.



You can next set sort orders.   NOTE: You do not have to include a field on the report in order to sort on it and in fact, for a summary report you will want to not include the summary field



You have some final options such as specifying page orientation and whether or not to include grand totals. The next screen shows my completed report.



Sample User List Report

Department	Full Name	Building	Cell Phone	Email Address
Accounting	John Doe	Admin Bldg		
Accounting	John Doe Jr.	Admin Bldg		
Accounting	Guest	Admin Bldg		
Accounting	Sam Pluser	Admin Bldg		
Accounting	Jane Smith	Admin Bldg		
IT	Admin Account	Admin Bldg	999-4321	dbandsons@aol.com
IT	Dennis Baggott	Admin Bldg		dbandsons@aol.com
IT	Staff Member	Admin Bldg		
Maintenance	Chuck Roast	Shop Floor		
Manufacturing	Jack Hammer	Production Plant 1		

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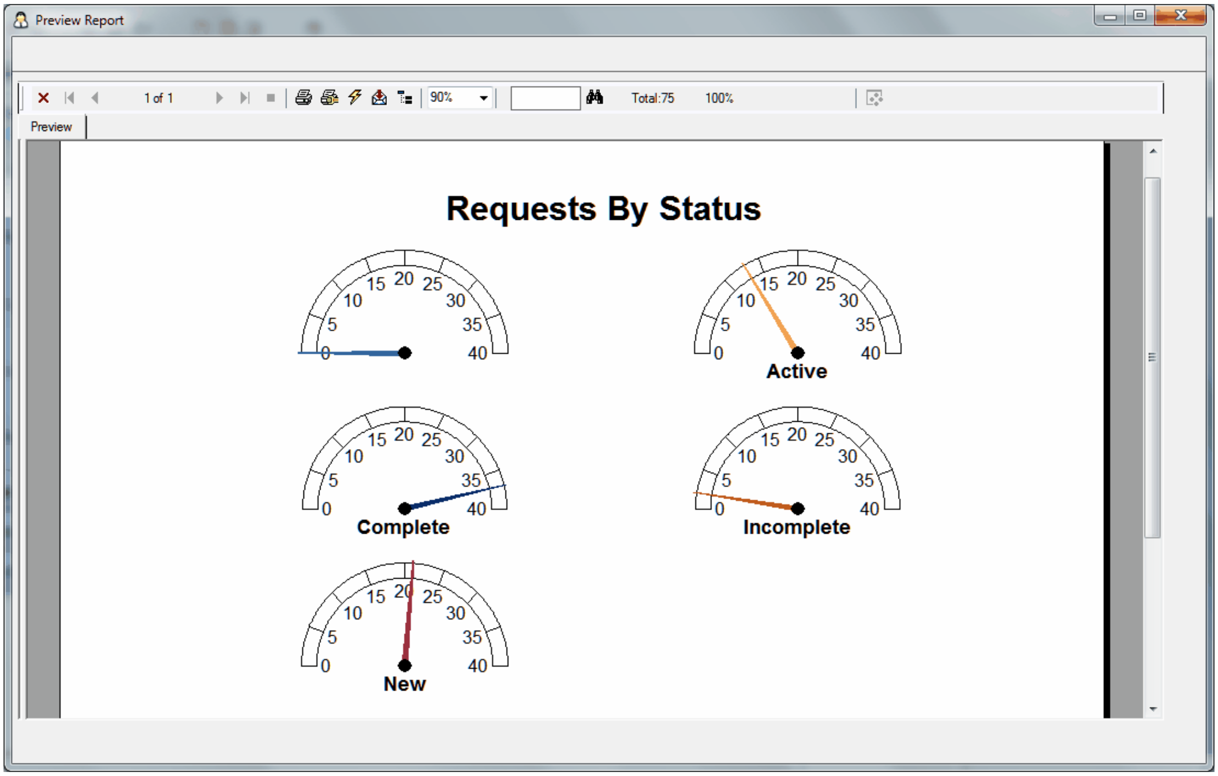
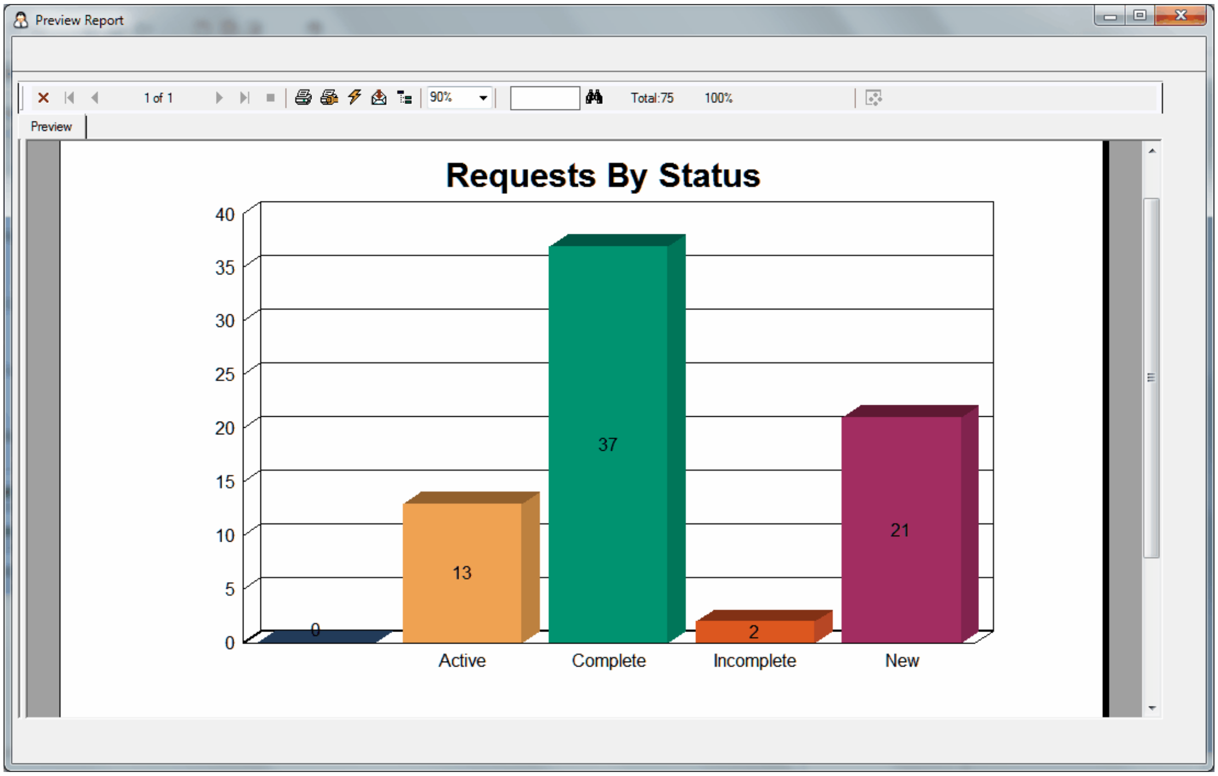
4.2 Crystal Reports

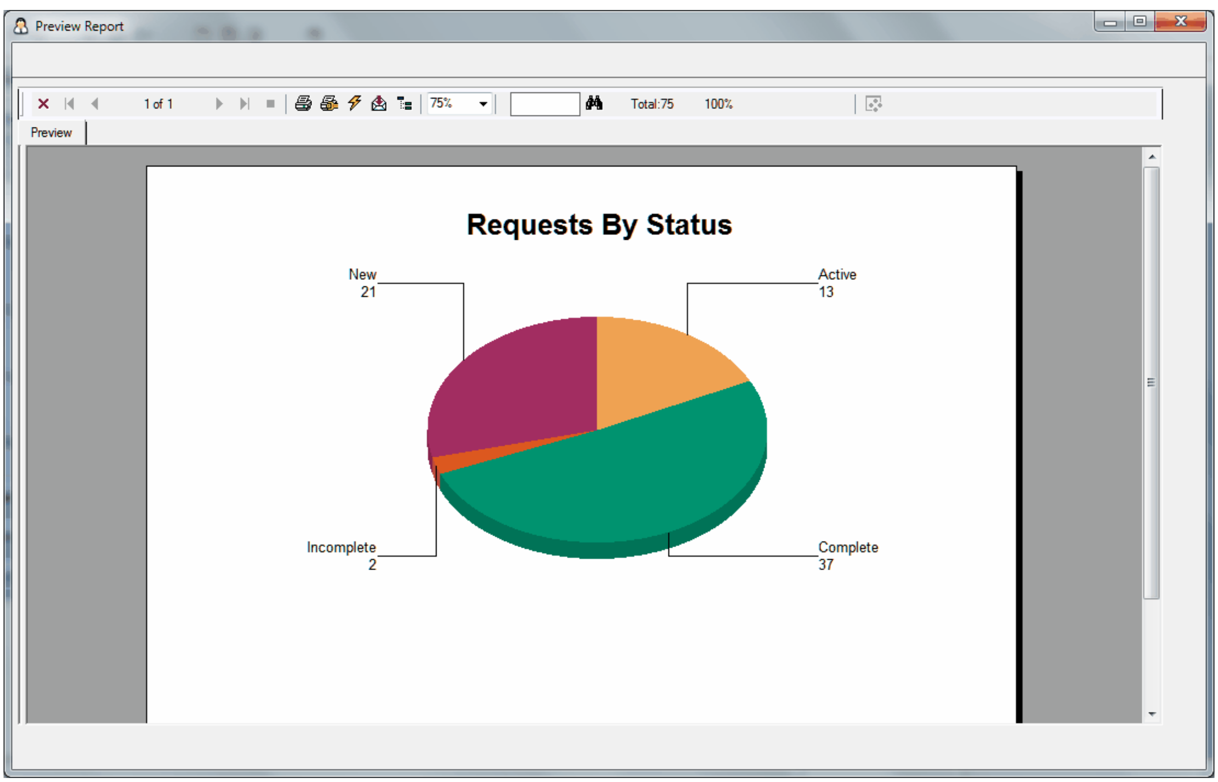
In addition to the "standard" reports, and the report wizards, I have included a variety of reports designed in Crystal Reports and the runtime files are provided as part of the installation
for those who do not own the full version. If you do already use Crystal Reports you will be able to modify the provided reports or if you have created your own reports using the aahd201232bit ODBC you
will be able to open them from with the program.

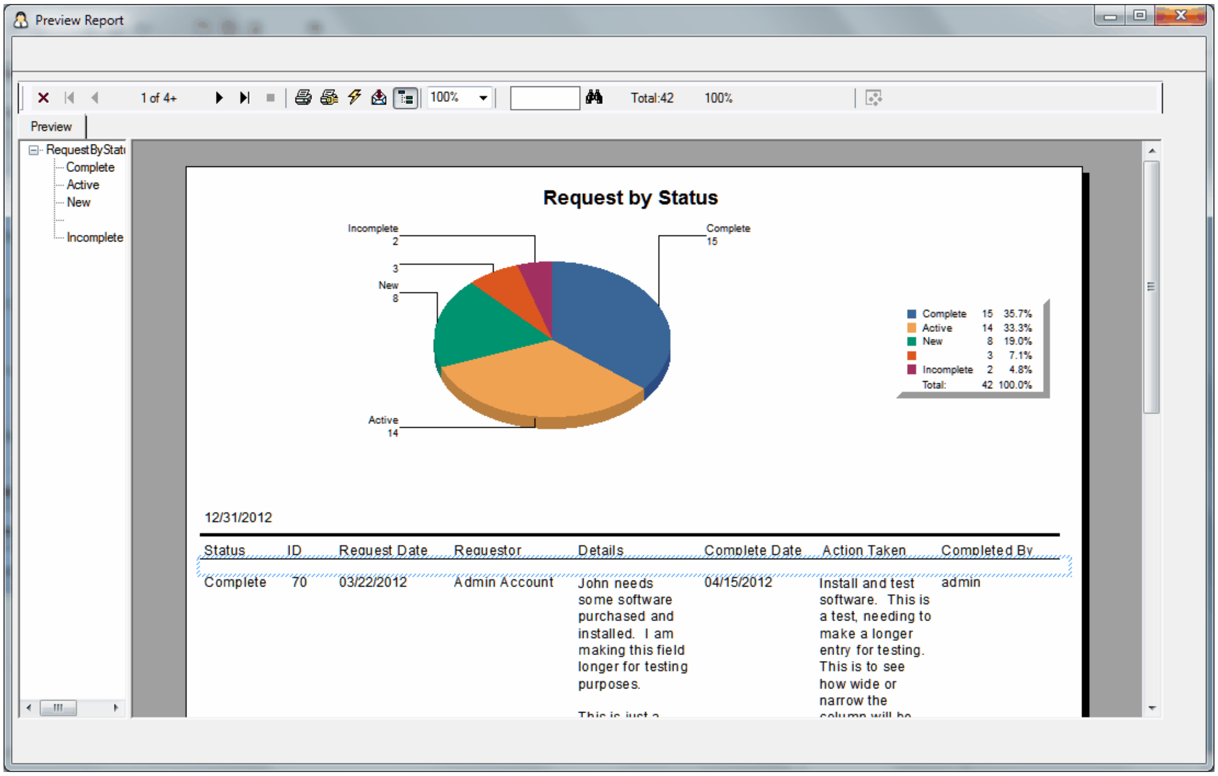
When previewing a report you will be able to use buttons at the top of the Report Preview window to navigate through the pages of a multi page report, click the Printer button to print the report or the print
setup button to select your printer or modify settings, such as Landscape vs. Portrait style. You can change the Zoom by clicking the drop down list of zoom factors. You may also enter a word or

phrase
and click the binoculars button to search for text in a report. Clicking the envelope button will allow you to export the report to a variety of formats and either create a file or launch the created file with the application registered on your PC to handle that file type.

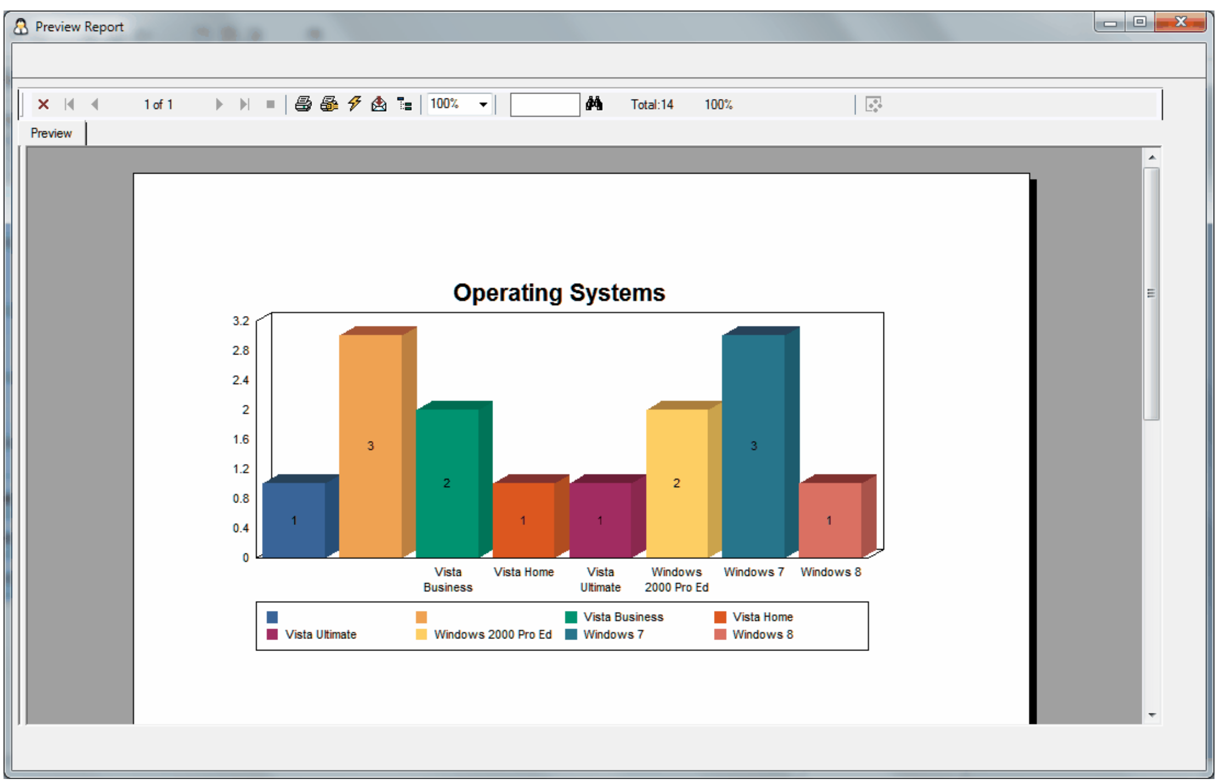



Preview Report
1 of 1
90%
Total:75
100%
Preview
Requests By Status
40
35
30
25
20
15
10
5
0
0
13
37
2
21
Active
Complete
Incomplete
New


Preview Report
1 of 1
75%
Total:75
100%
Preview
Requests By Status
New
21
Active
13
Incomplete
2
Complete
37



Preview Report
1 of 4+
100%
Total:42
100%
Preview
RequestByStat
Complete
Active
New
Incomplete
Request by Status
Incomplete
2
3
New
8
Complete
15
Active
14
Complete 15 35.7%
Active 14 33.3%
New 8 19.0%
3 7.1%
Incomplete 2 4.8%
Total: 42 100.0%
12/31/2012
Status
ID
Request Date
Requestor
Details
Complete Date
Action Taken
Completed By
Complete
70
03/22/2012
Admin Account
John needs some software purchased and installed. I am making this field longer for testing purposes.
04/15/2012
Install and test software. This is a test, needing to make a longer entry for testing. This is to see how wide or narrow the
admin

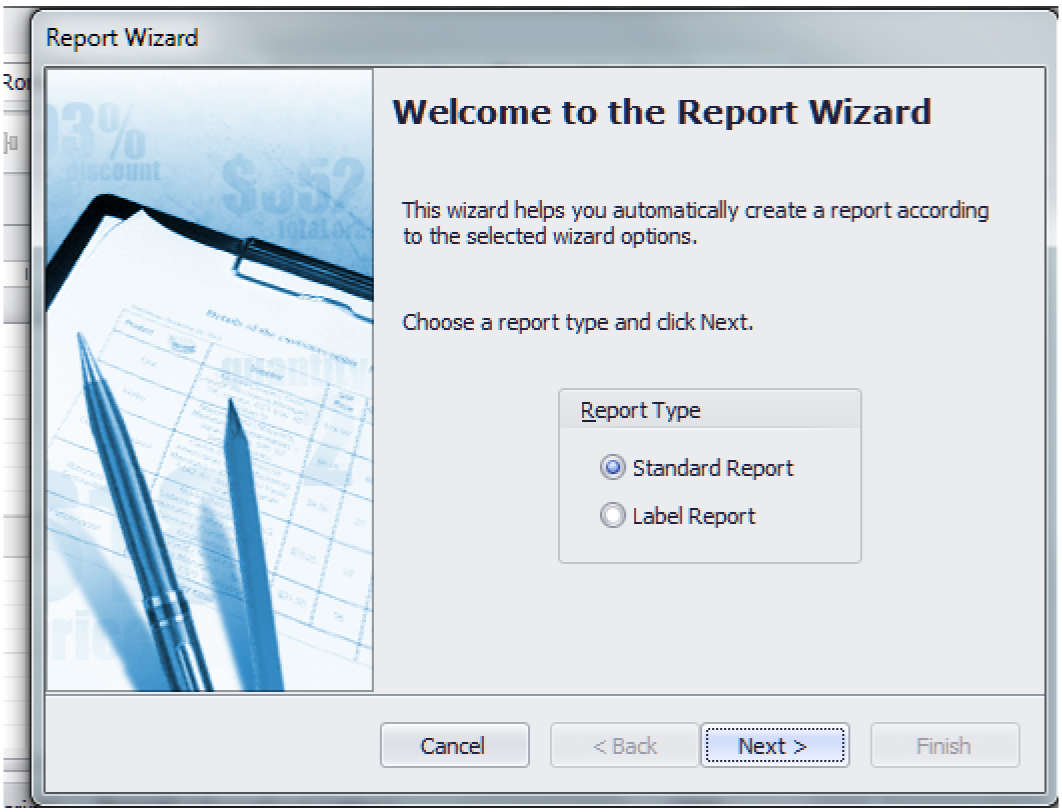


Preview Report
1 of 1
100%
Total:14
100%
Preview
Operating Systems
3.2
2.8
2.4
2
1.6
1.2
0.8
0.4
0
1
3
2
1
1
2
3
1
Vista Business
Vista Home
Vista Ultimate
Windows 2000 Pro Ed
Windows 7
Windows 8
Vista Business
Vista Home
Vista Ultimate
Windows 2000 Pro Ed
Windows 7
Windows 8

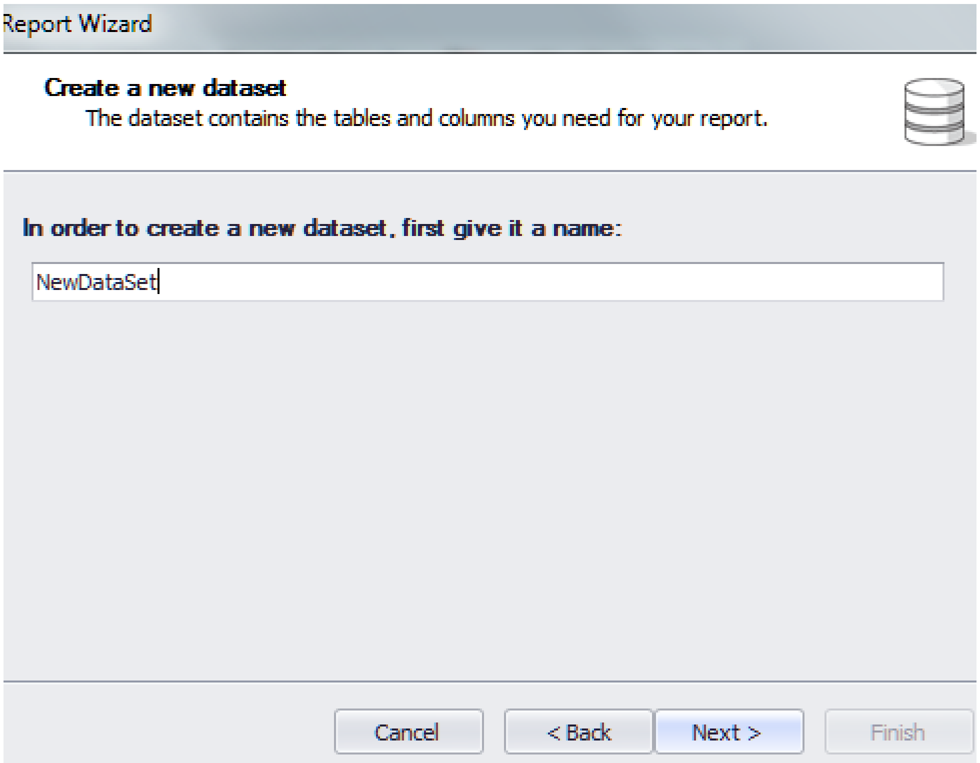
4.3 Report Designer

The Standalone Report Designer will be provided to those that buy a site license for AccessAble Help Desk 2012. The Report Designer is much more powerful than the Report Wizard. The ARD does include a wizard to let you quickly create reports - both tabular (list style) and columnar. You can include Parameters to filter data when you run the reports. Include Bar Codes for items like Serial Numbers. Use the calculated fields in the MSSQL Database for Day, Hours and Minutes to Complete. The Report Designer requires the .NET 4.0 framework on the computer where you install the program. See the sample screen shots below.

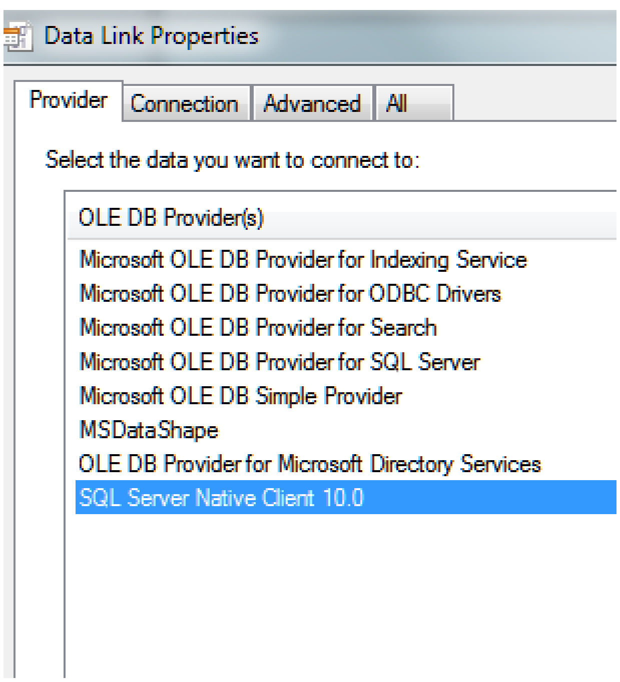
Launch the Report Designer by clicking on the Shortcut on your desktop or the start menu. Choose Add New Report using the Report Wizard then choose Standard Report.

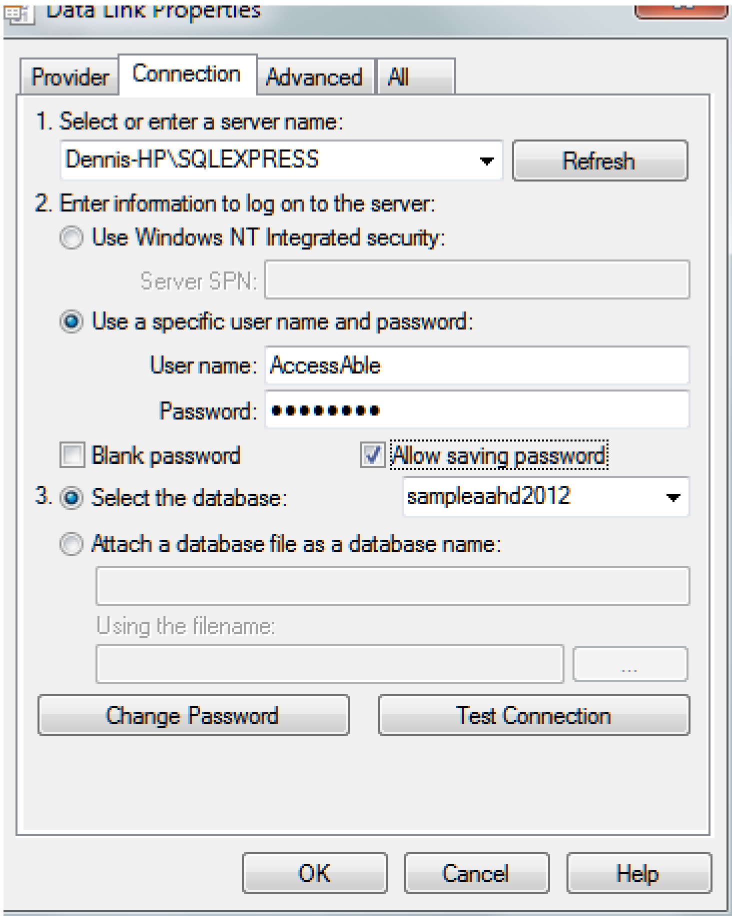


Give the Dataset a name, any name will do.



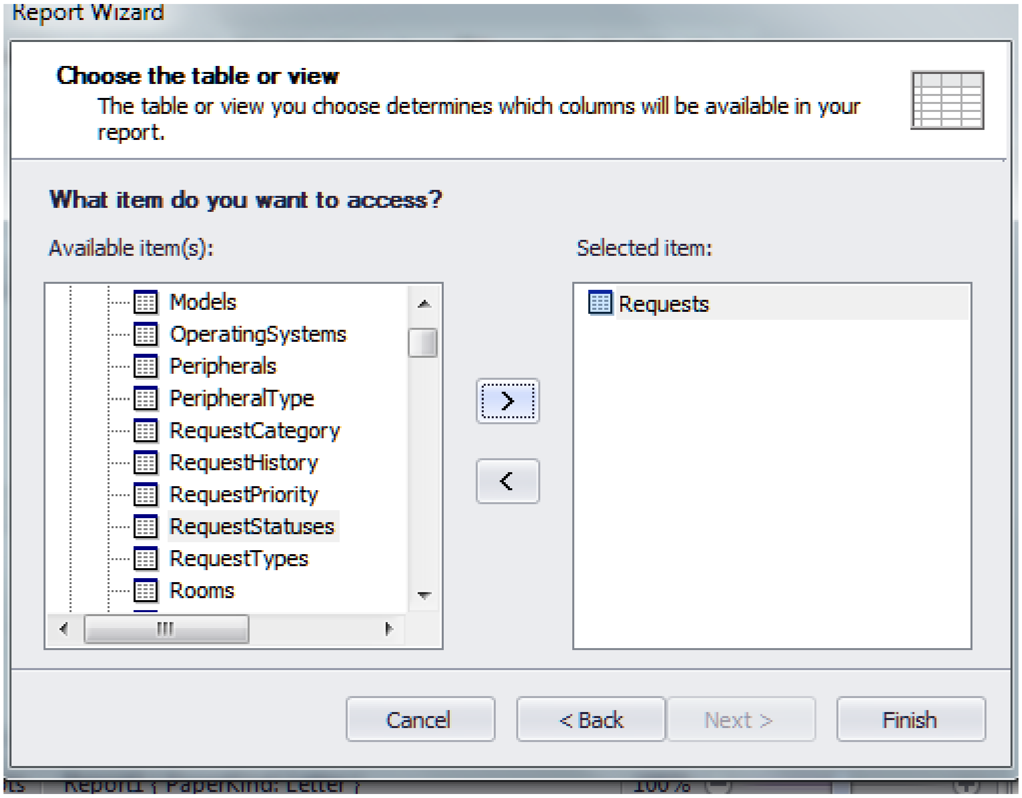
You will next be prompted to create a data source and you have a variety of options. Let's use SQL Server as the provider, then set up the connection properties.



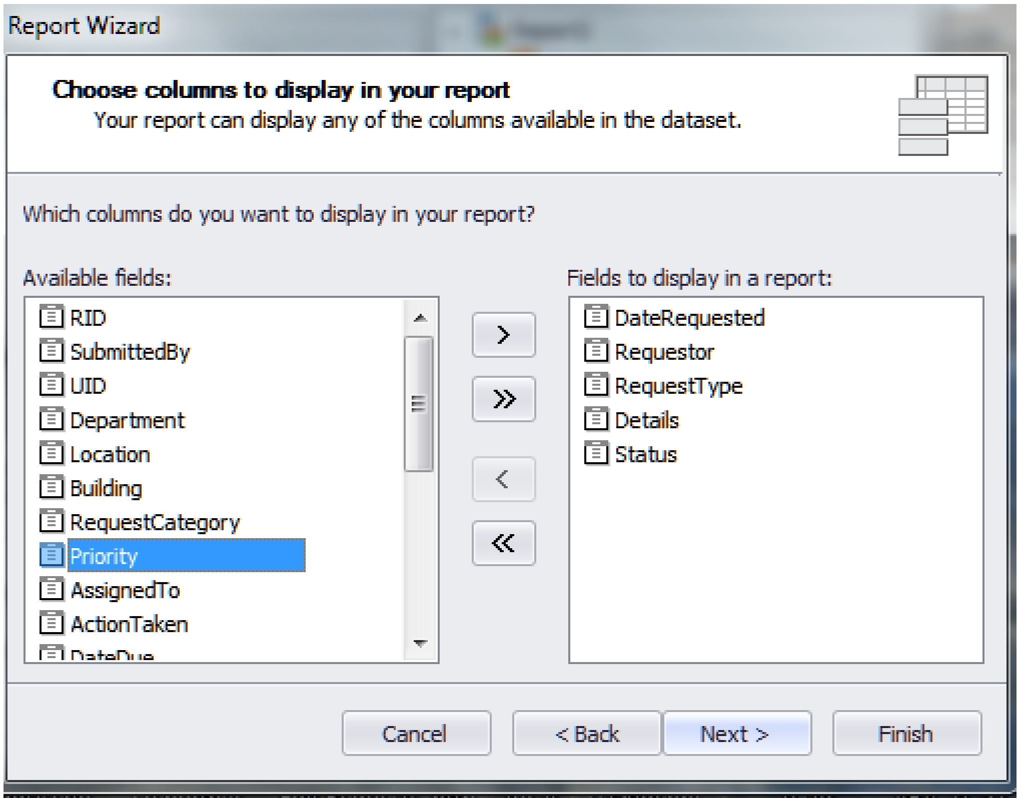


You can enter your database server name or IP address. If not using the windows credentials, enter the User Name and Password you created earlier during the setup process. You can select the database name from the drop down list.

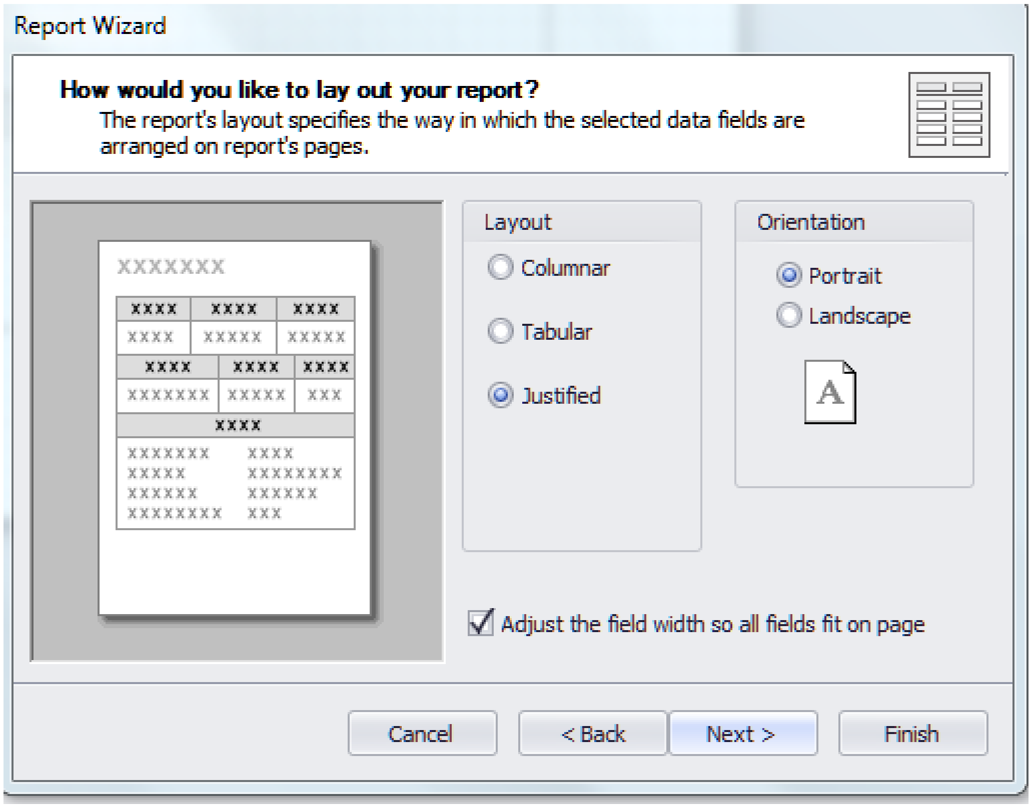
Next select the name of the table you want to use for the report.

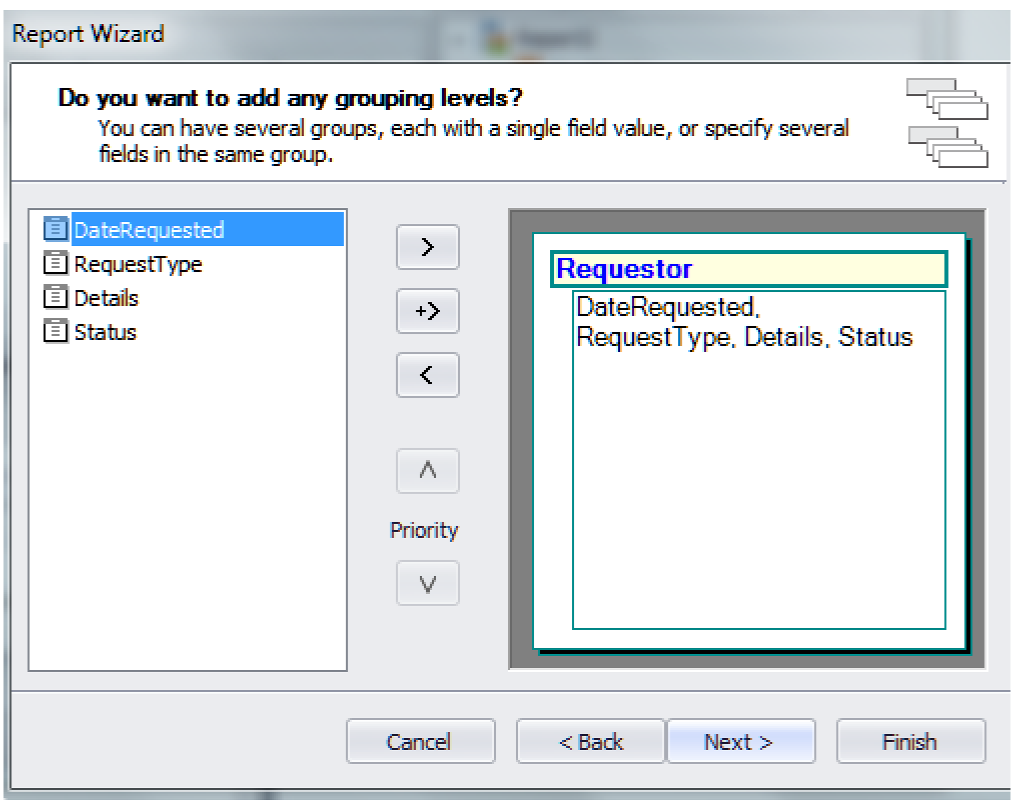


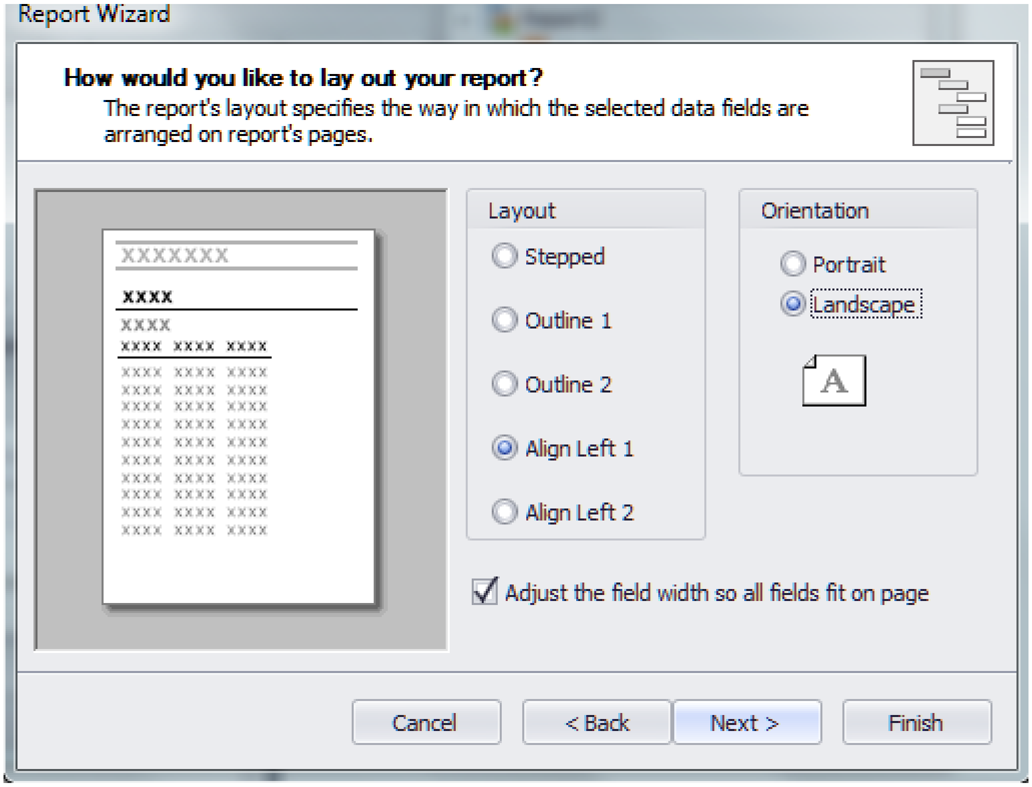
Select the field names you want to include in the report. Use arrow keys to add/remove fields from the report. Click the Double Arrows to Add or Remove All Fields.

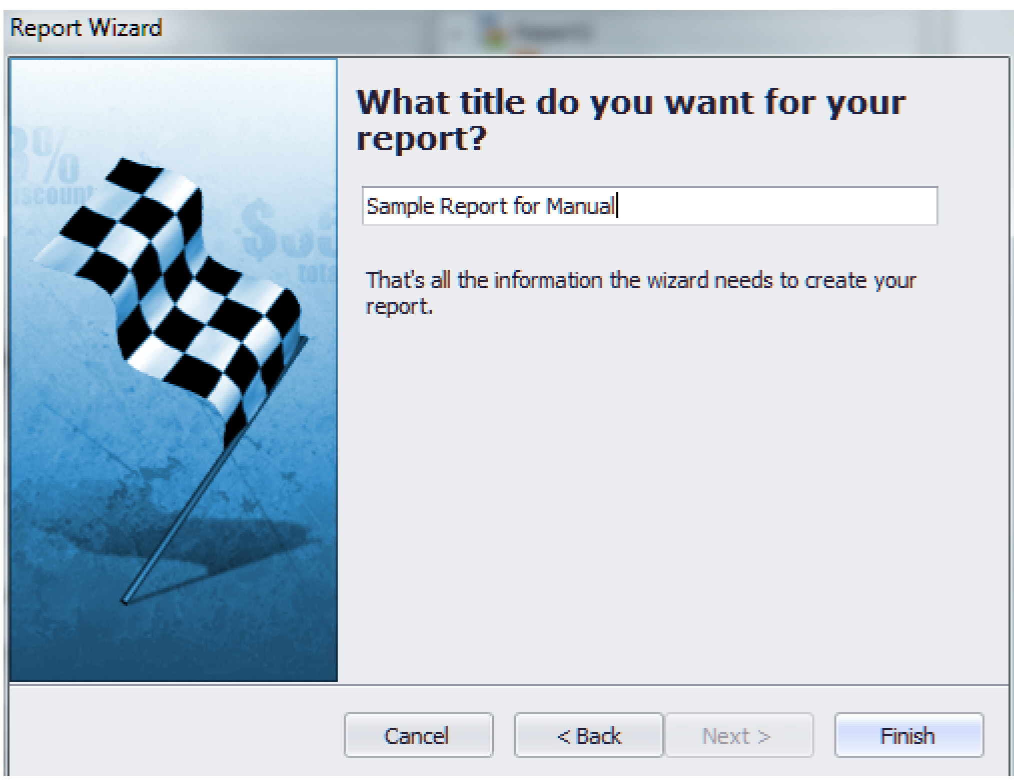


If you do not choose column sorting and grouping you have the option (shown below) to select Columnar or Justified report styles in addition to tabular style.

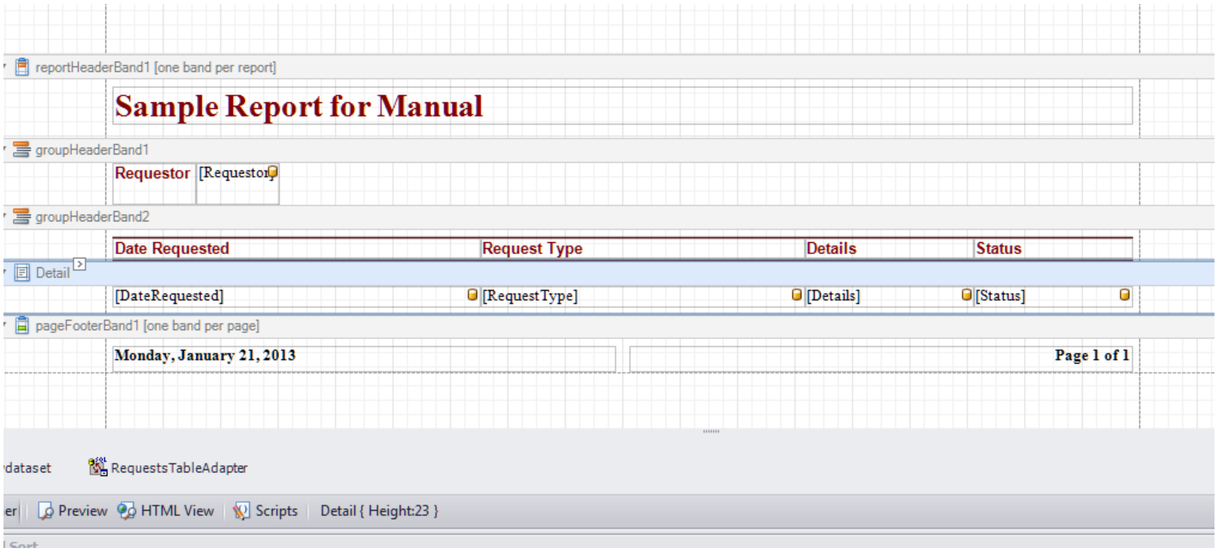

Report Wizard
How would you like to lay out your report?
The report's layout specifies the way in which the selected data fields are arranged on report's pages.
Layout
Columnar
Tabular
Justified
Orientation
Portrait
Landscape
Adjust the field width so all fields fit on page
Cancel
< Back
Next >
Finish


Report Wizard
Do you want to add any grouping levels?
You can have several groups, each with a single field value, or specify several fields in the same group.
DateRequested
RequestType
Details
Status
Priority
Requestor
DateRequested, RequestType, Details, Status
Cancel
< Back
Next >
Finish

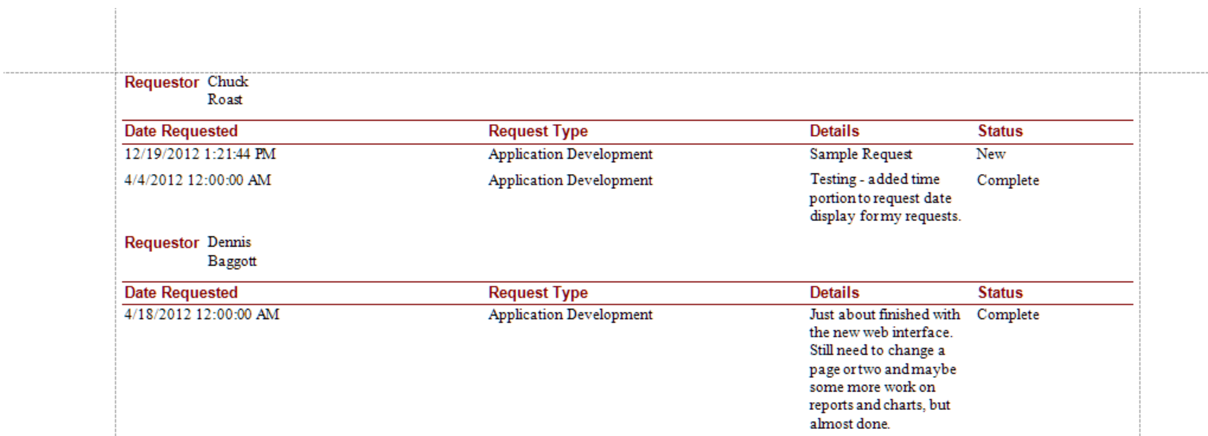


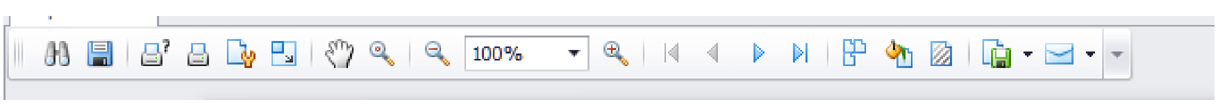


Below is our simple tabular report design.



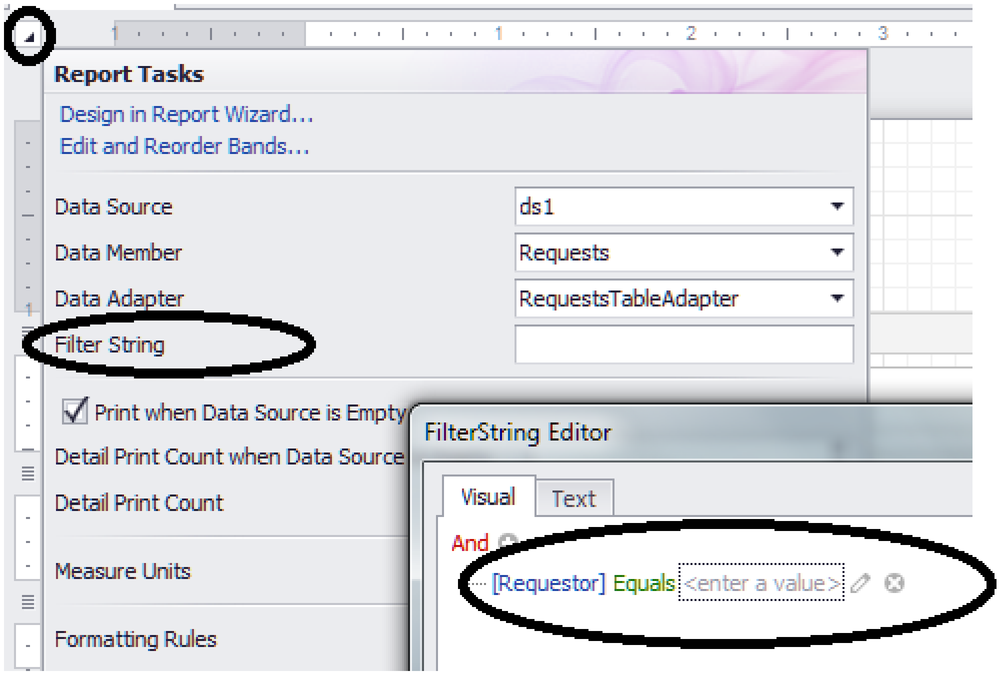
Below is our report in Preview mode. When in preview mode you have options to export or print the report.

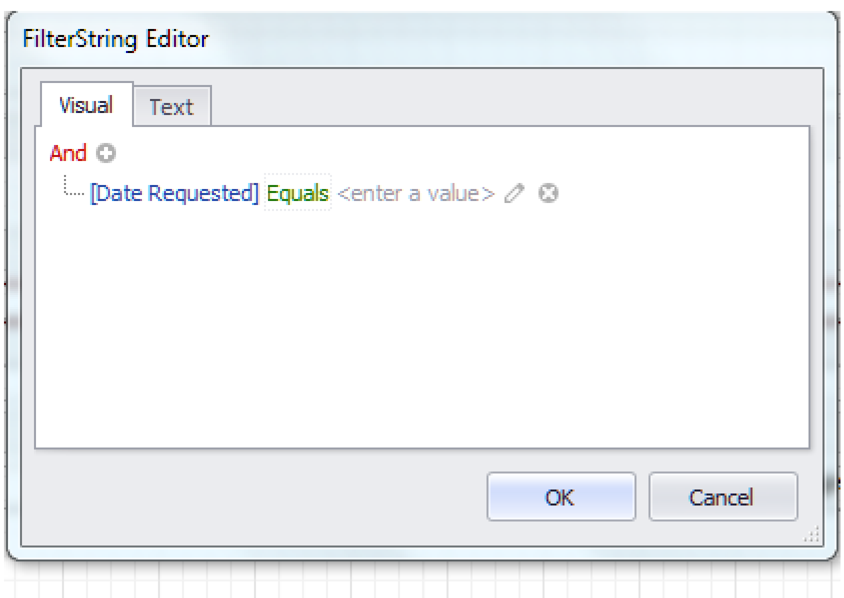




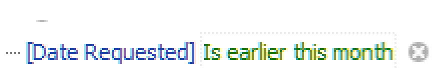
Notice the options on the tool bar when in preview mode. For example, click the Arrow next to the envelope button and choose to send the report via email in a variety of file formats.

Back in Design View, Clicking on the triangle (circled in image below) will pop up a menu to let you perform a variety of functions. In this example, I am editing the Filter String. This is in order to modify the report to show only record matching conditions that I will specify.

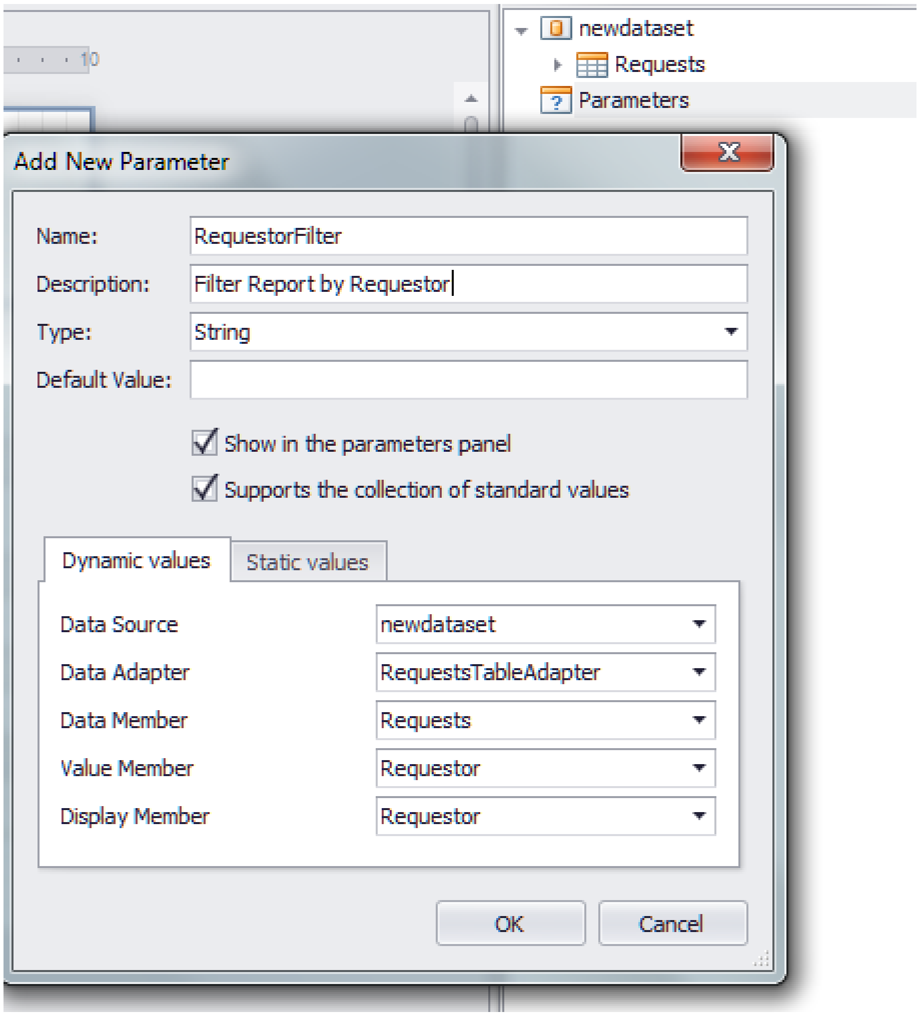




The simplest filter condition is show below where I specify I only want to report on requests from the current month

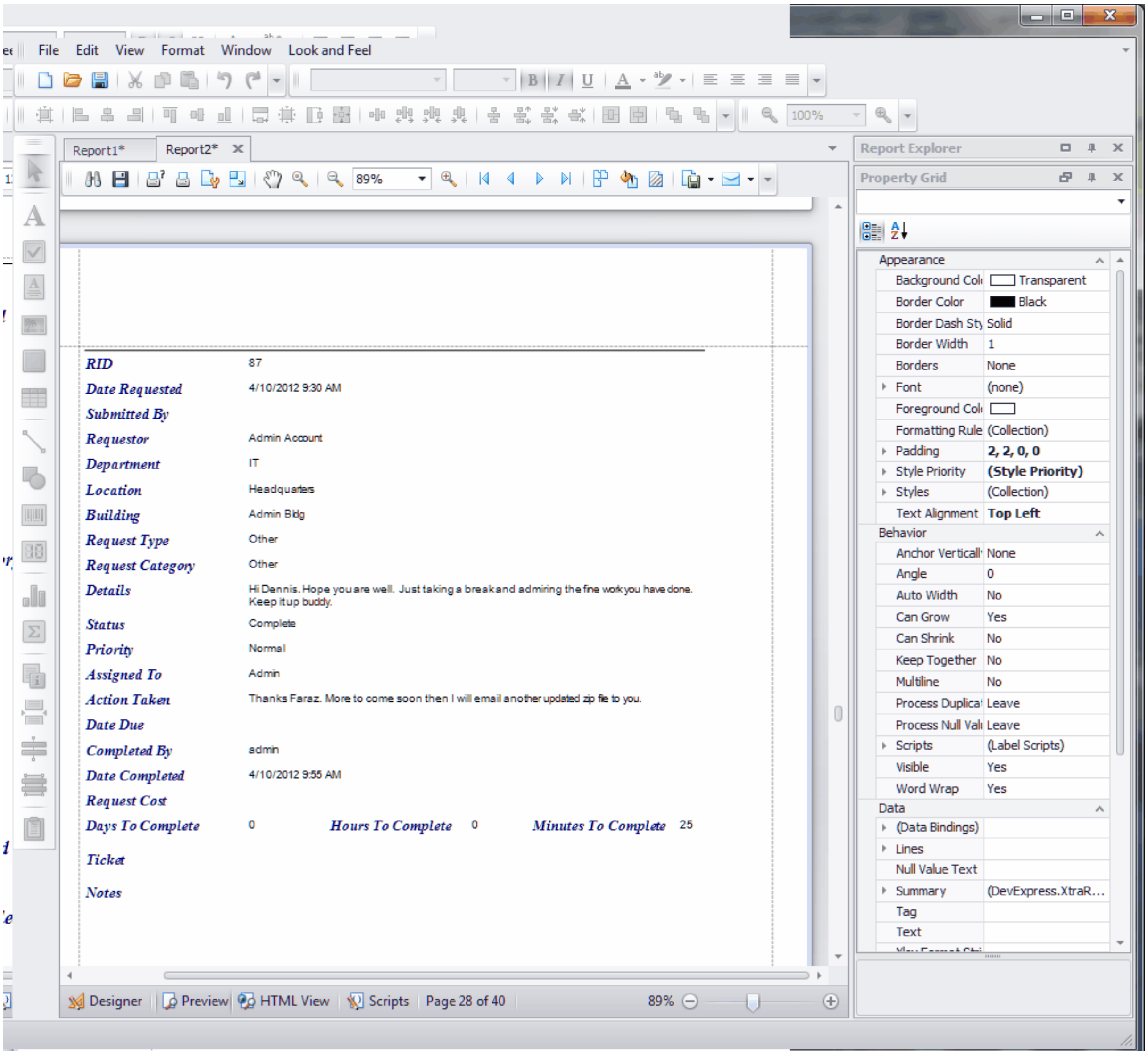


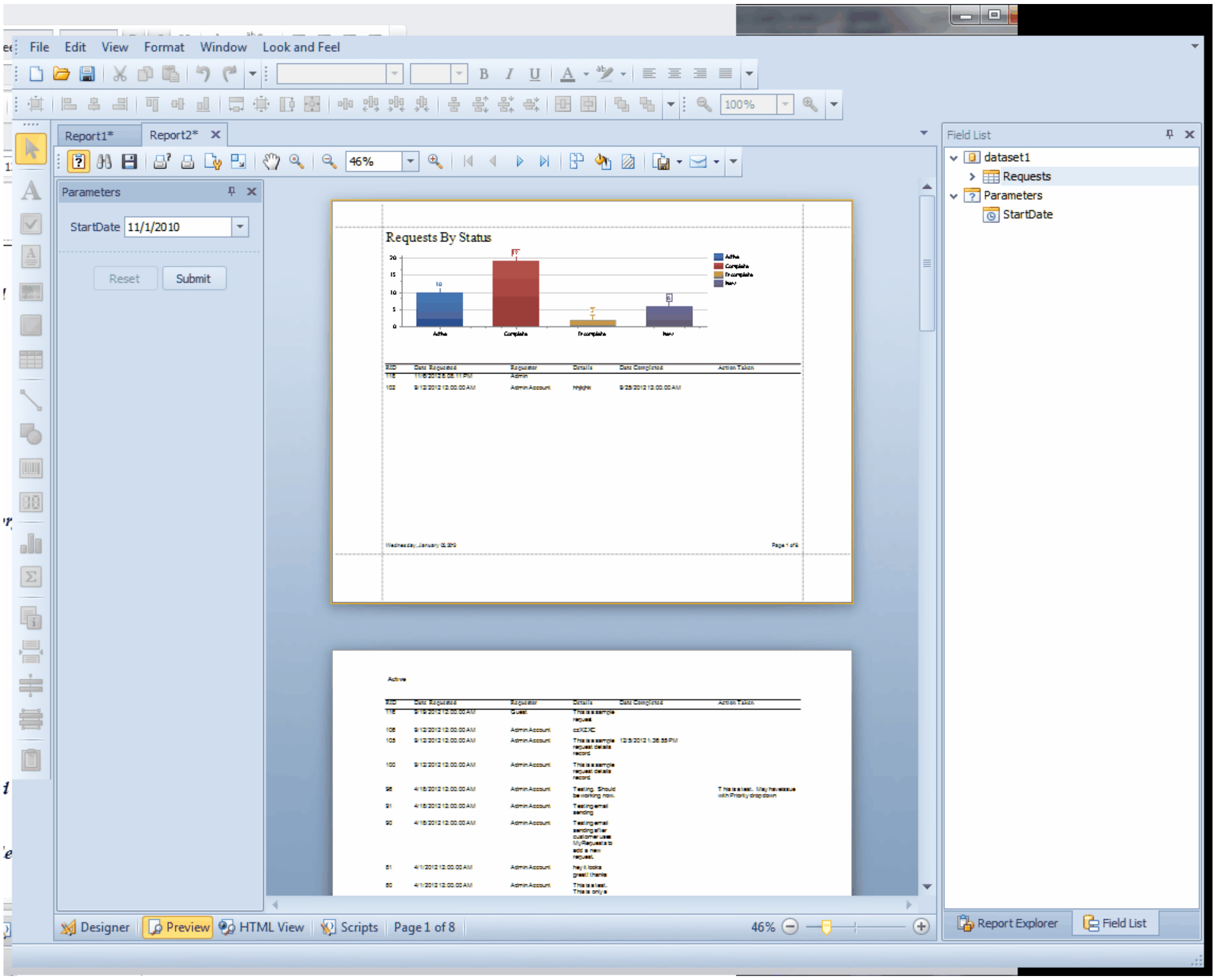
In the next screen shot I am going to use a report Parameter to filter the data to be reported. Notice the ?Parameter icon on the right side of the design surface. This is where I add a new parameter.

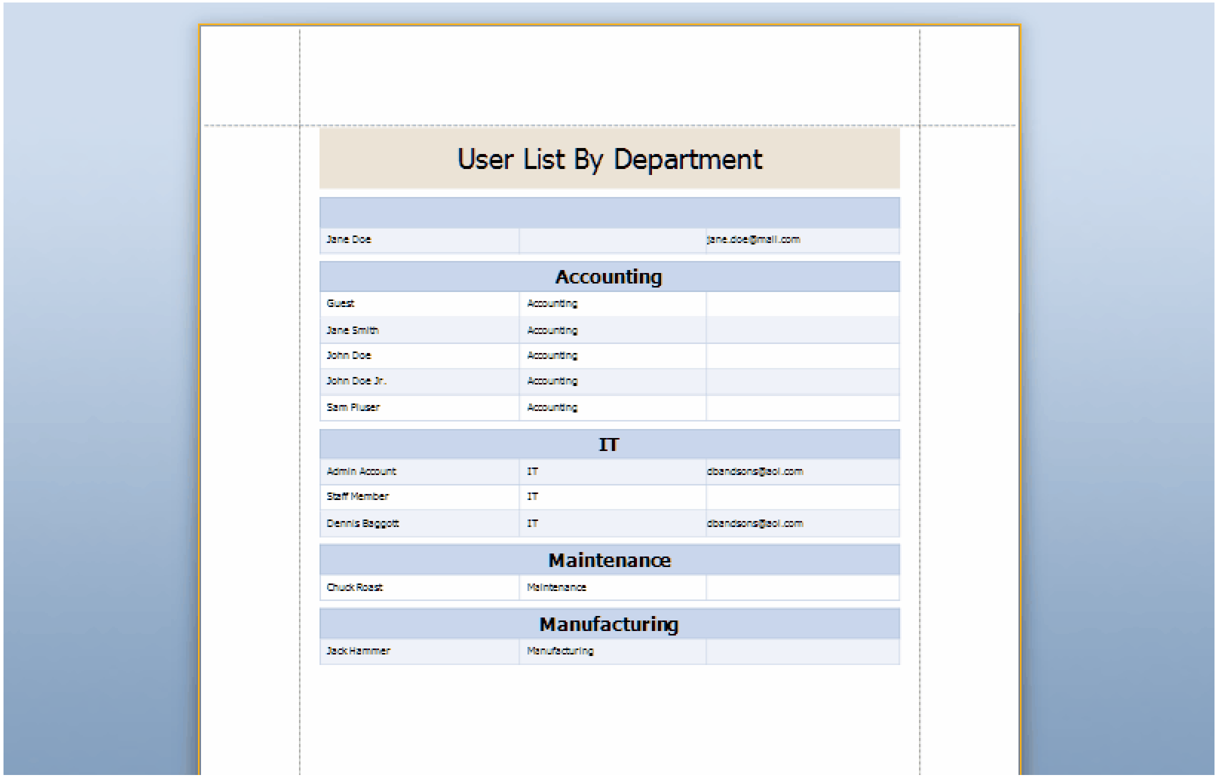


Notice in the screen shot above I am using the same table I used to add fields to the Report (Requests) as the Data Member. I use the field "Requestor" for both the Value and Display member. This means that when I run the report I will be prompted to select a value from the Requestor field of the Requests table to filter the report.

The next screen shots just show some of the reports you can create using the AccessAble Report Designer. I plan on posting video tutorials in the future that will help in creating more complicated reports. These videos may only be available to registered owners of AccessAble Help Desk 2012 - or the earlier Pro Edition. The AccessAble Report Designer can be used with data from either of these programs - and others.

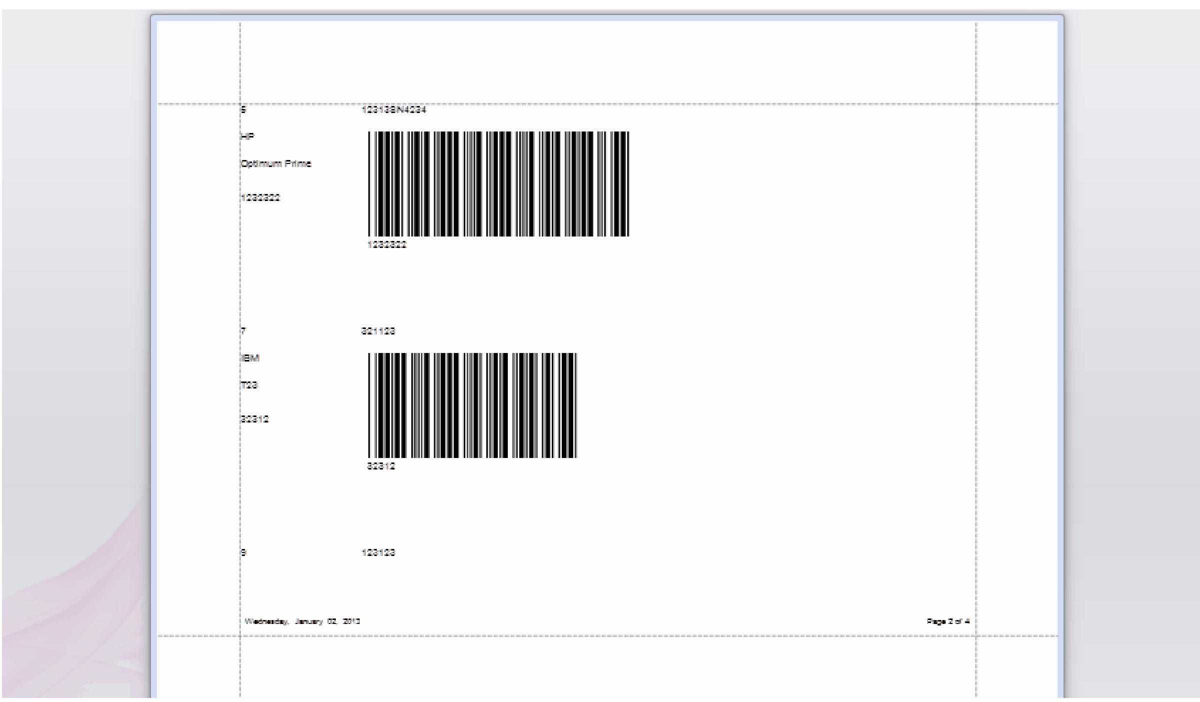

File Edit View Format Window Look and Feel
Report1* Report2*
Report Explorer
Property Grid
RID 87
Date Requested 4/10/2012 9:30 AM
Submitted By
Requestor Admin Account
Department IT
Location Headquarters
Building Admin Bldg
Request Type Other
Request Category Other
Details Hi Dennis. Hope you are well. Just taking a break and admiring the fine work you have done. Keep it up buddy.
Status Complete
Priority Normal
Assigned To Admin
Action Taken Thanks Faraz. More to come soon then I will email another updated zip file to you.
Date Due
Completed By admin
Date Completed 4/10/2012 9:55 AM
Request Cost
Days To Complete 0 Hours To Complete 0 Minutes To Complete 25
Ticket
Notes
Appearance
Background Color Transparent
Border Color Black
Border Dash Style Solid
Border Width 1
Borders None
Font (none)
Foreground Color
Formatting Rules (Collection)
Padding 2, 2, 0, 0
Style Priority (Style Priority)
Styles (Collection)
Text Alignment Top Left
Behavior
Anchor Vertically None
Angle 0
Auto Width No
Can Grow Yes
Can Shrink No
Keep Together No
Multiline No
Process Duplicates Leave
Process Null Values Leave
Scripts (Label Scripts)
Visible Yes
Word Wrap Yes
Data
(Data Bindings)
Lines
Null Value Text
Summary (DevExpress.XtraR...
Tag
Text
Designer Preview HTML View Scripts Page 28 of 40 89%


File
Edit
View
Format
Window
Look and Feel
100%
Report1*
Report2*
46%
Parameters
StartDate
11/1/2010
Reset
Submit
Requests By Status
Field List
dataset1
Requests
Parameters
StartDate
Designer
Preview
HTML View
Scripts
Page 1 of 8
46%
Report Explorer
Field List



User List By Department

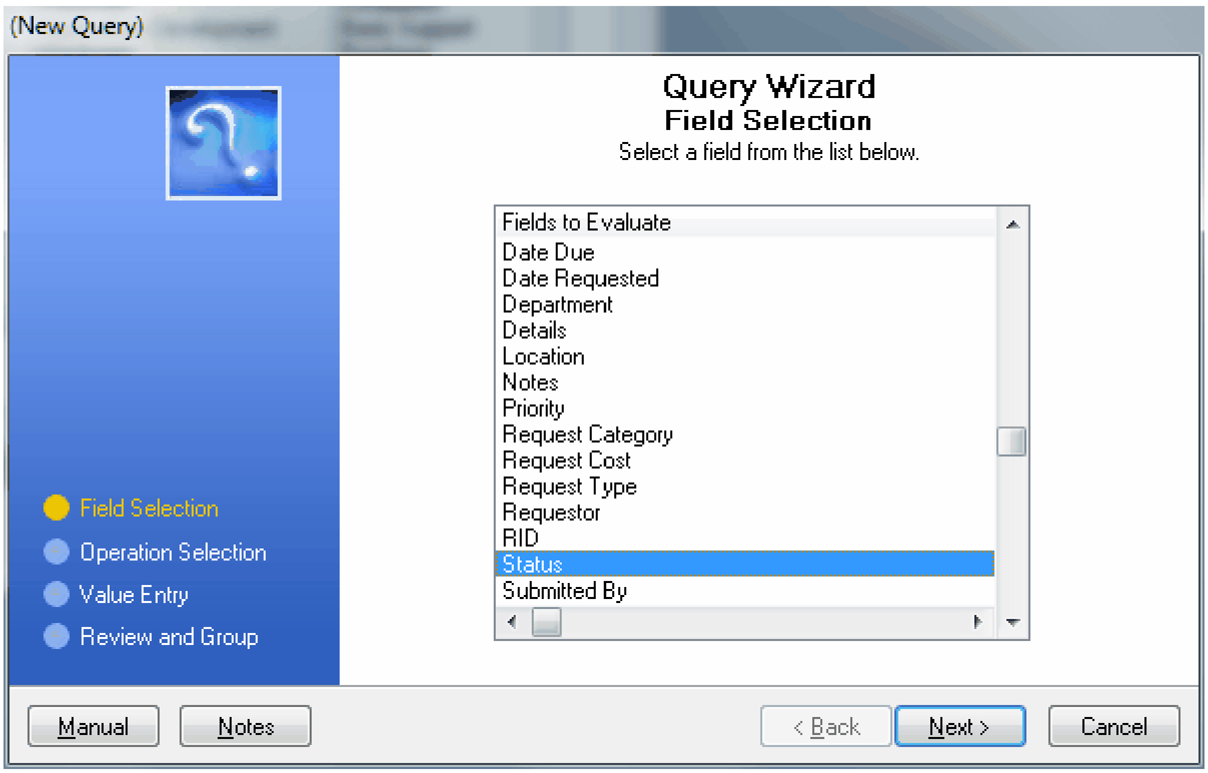
Jane Doe		jane.doe@mail.com
Accounting		
Guest	Accounting	
Jane Smith	Accounting	
John Doe	Accounting	
John Doe Jr.	Accounting	
Sam Pluser	Accounting	
IT		
Admin Account	IT	dbandsons@aol.com
Staff Member	IT	
Dennis Baggott	IT	dbandsons@aol.com
Maintenance		
Chuck Roast	Maintenance	
Manufacturing		
Jack Hammer	Manufacturing	



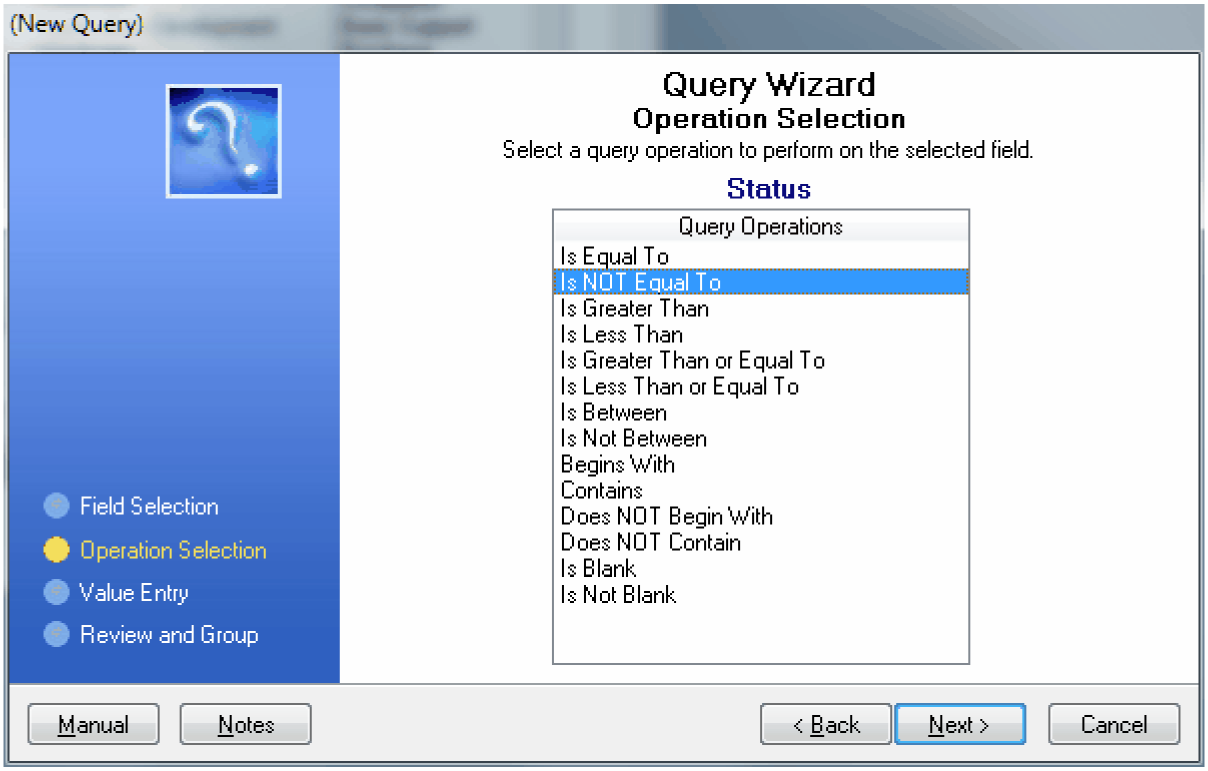
5 Tools

5.1 Query Wizard

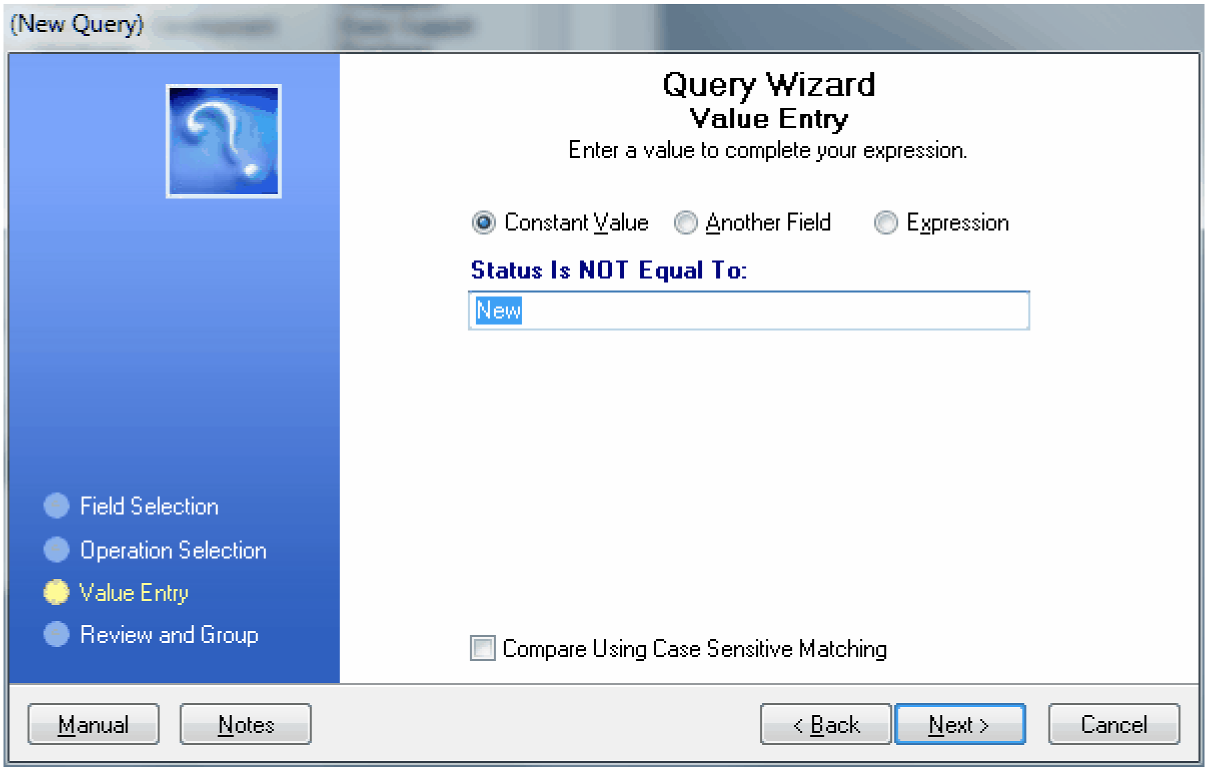
The Query Wizard provides a quick and easy way to filter data either for display on browse screens or to filter reports. Let's go through the steps of creating a query. You will first need to choose the field you to want to search. In this example I am going to query on the Request Status field.

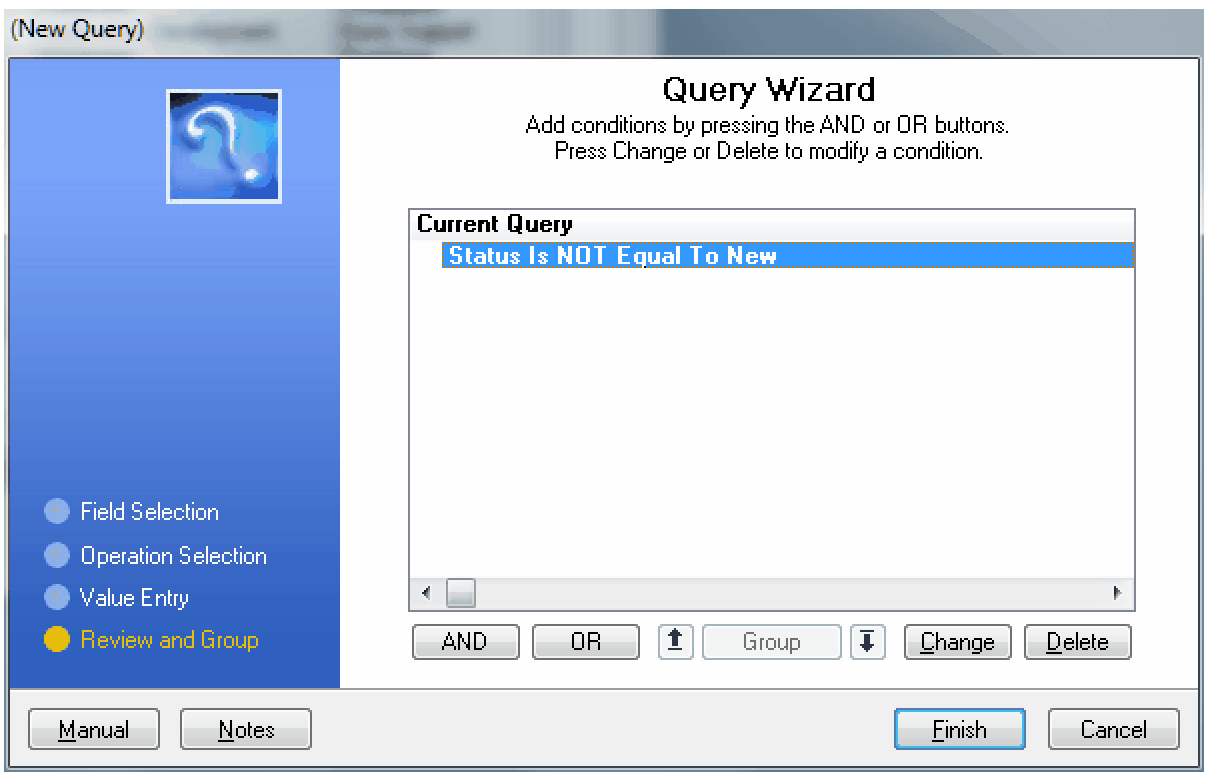


Next you will need to choose an operator to use. This version adds some new operators, such as the Between and Not Between. This is especially helpful for data searching. Also, new operators for the date type fields allow you to search for a month number (12- December, 11 - November and so on). I will choose the Not Equal To operator.

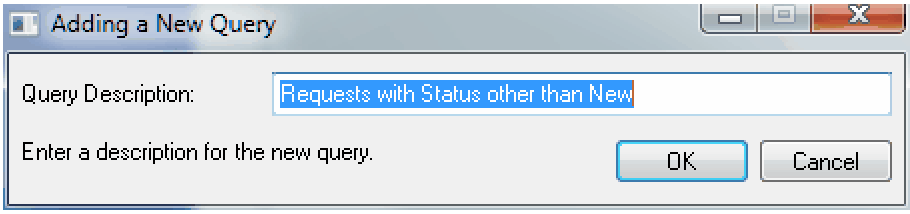


After choosing a field and an operator you next choose the value to search. In most cases this will be a constant however, you can also compare one field to another. An example would be to find records where the Complete Date is equal to the Due Date field. In this case, I want to find requests where the Status is Not Equal to New, so I type in the value New.

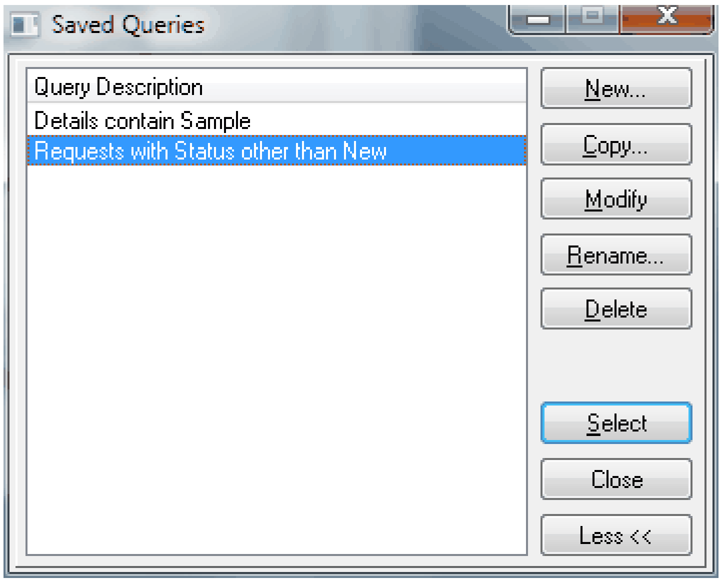




Finally, give you query a meaningful name. Click OK and the data is filtered as specified.



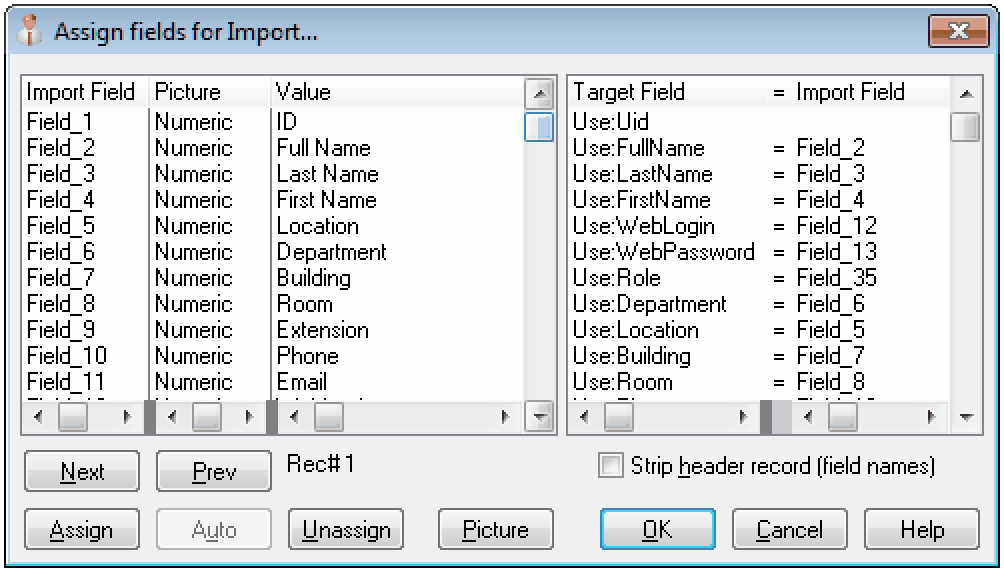
Now that query will show up in the list.



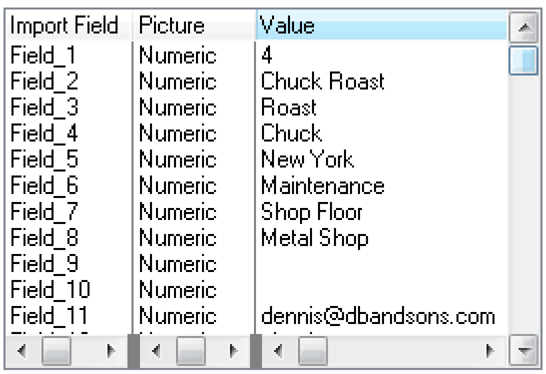
5.2 Import from CSV

Microsoft SQL Server Management Studio does provide capabilities for importing (and exporting) from a variety of data sources and many of our customers may use that to import data. How eve, we have included import capabilities for several of the main files to let you import data from CSV (character separated value) formatted files. This is the most common, or lowest common denominator file format and you can even export data from Microsoft Active Directory in CSV format.

After selecting the source file, click on the column on the left side and matching column of the right side and click the Assign button. Repeat this for each field you want to import. If the source file includes columns with the field names in the first row you may want to check the button to strip the header row.



Also, note that there is a next button to let you preview rows in the source data file before importing.



After you click the OK button to begin importing you will see a progress bar as records are imported.
NOTE: Before importing records you may want to have a backup of the target table just in case

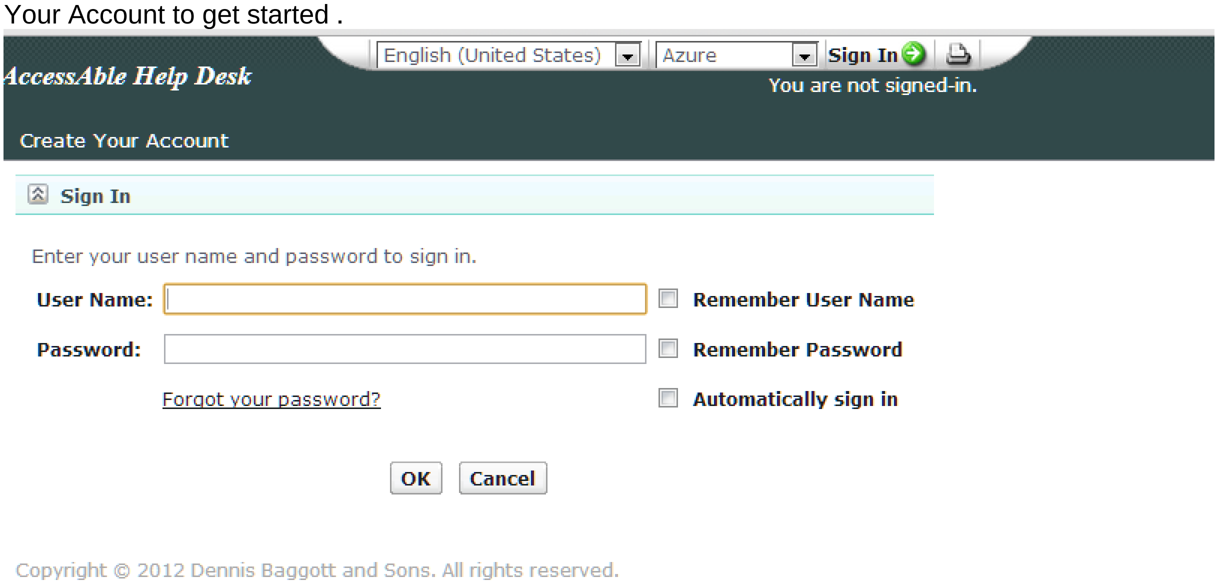
NOTE: Registered users that will be using the optional web pages will find an import option on many pages. This includes for file formats in addition to .csv.

6 Web Browser Interface

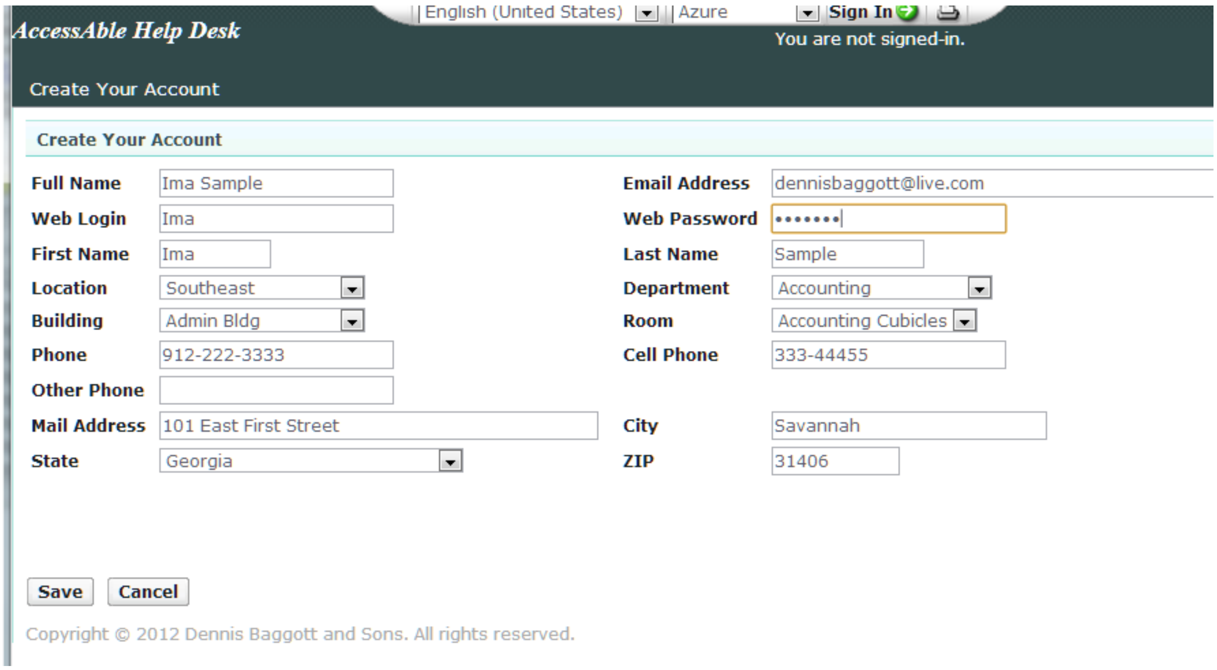
While some organizations may be fine with just the windows desktop application to allow one or more staff members an easy, multi user ready way to record, update and report on requests for support from end users, computer, peripheral and software inventory, and so on, other organizations will want to use a web browser interface (with mobile web pages for access using smart phones) to do many of the same functions. The web interface can also be helpful as it will allow end users the ability to submit requests via web browser or smart phone as well. The next pages will describe and include screen shots for the web interface provided as a "bonus" to those who register (purchase a site license for AccessAble Help Desk 2012).

6.1 End User Web Interface

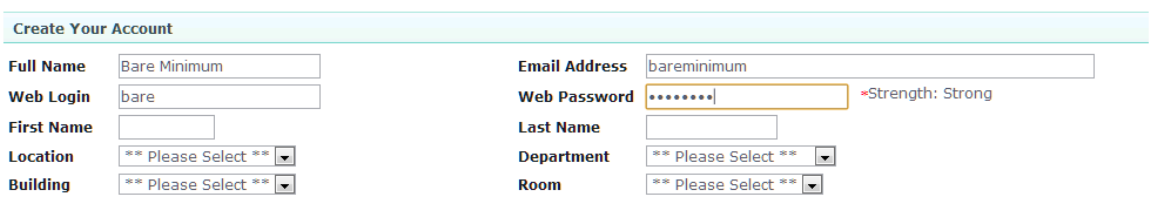
The first screen you, or an end user, will see when accessing the AccessAble Help Desk 2012 Web Interface is shown below. In order to Sign In - an account is needed. Depending on your situation you may create an end user account and send the details to your end user/customer by email or you may allow them to create their own account. Let's say that is the case and a user clicks on the Create Your Account to get started .



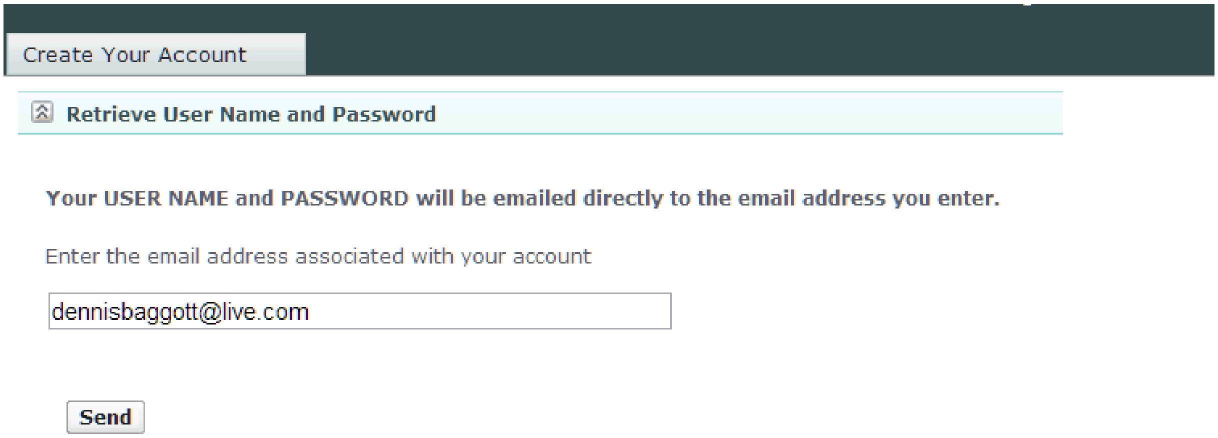
Not all the account information available for entry is required.



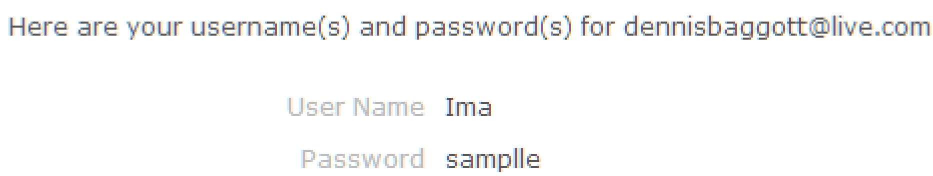
The very least required to create an account is the Full Name, Web Login Name, Web Password, and Email Address. If the person creating an account leaves out any of that information the account won't be created until they add the missing items. A message will tell them which field is needed that they have not entered. Although a user creating their password will see a message about how weak or strong their password is - minimum number and type of characters, etc, is not enforced. Just a hint provided about the password strength.

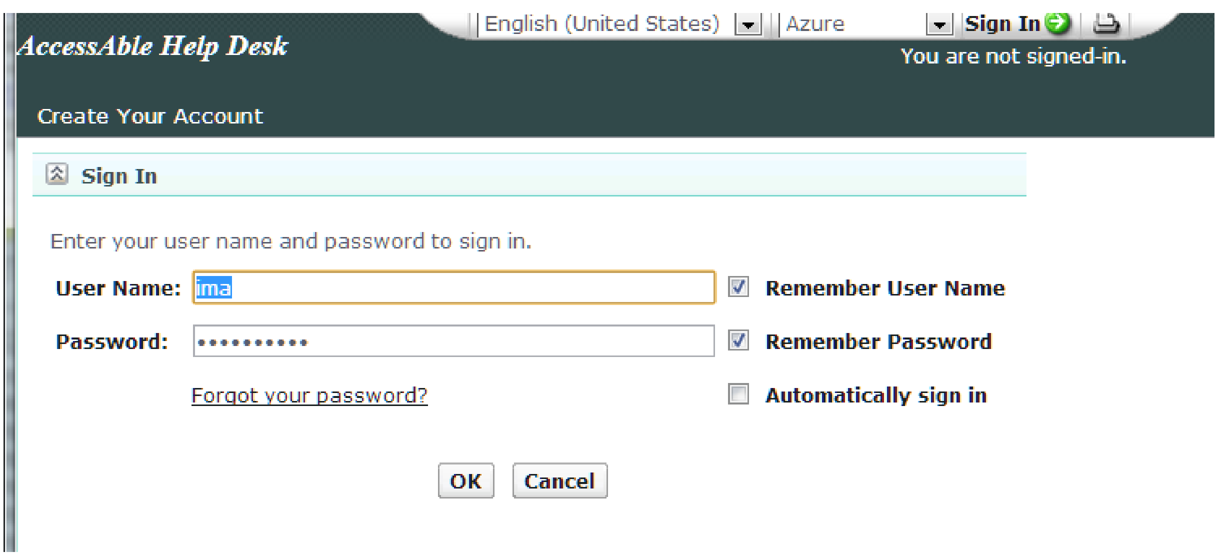


It happens to the best of us (well it happened to me). Sometime you forget your password or as I did when creating a sample account you mistype what you thought you typed. What to do if after creating an account you try to login and can't? Click the forgot password icon and if the web page mail settings are correct in the web.config file an email like the one below can be sent to the end user.

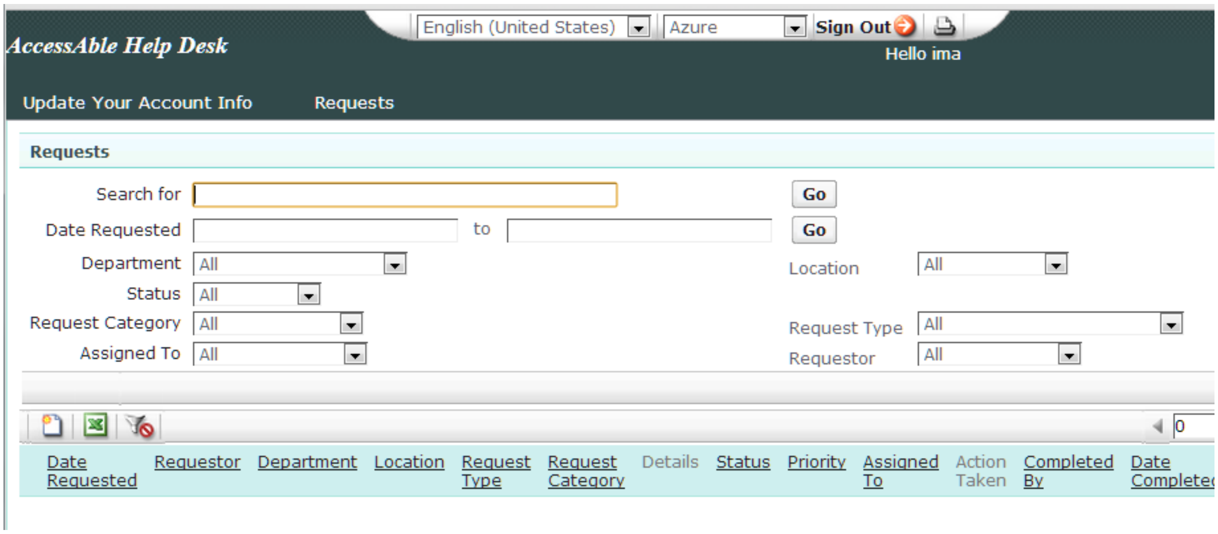


As you can see from the email message below I mistyped the word "sample" so I can login with the password and then later update the password.

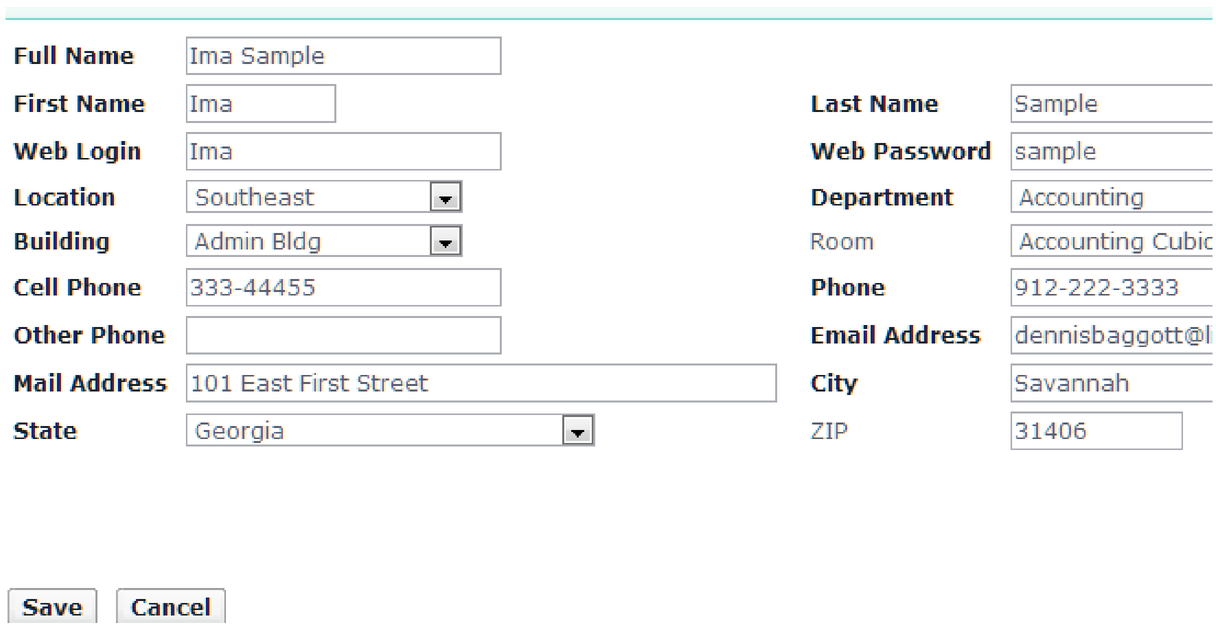




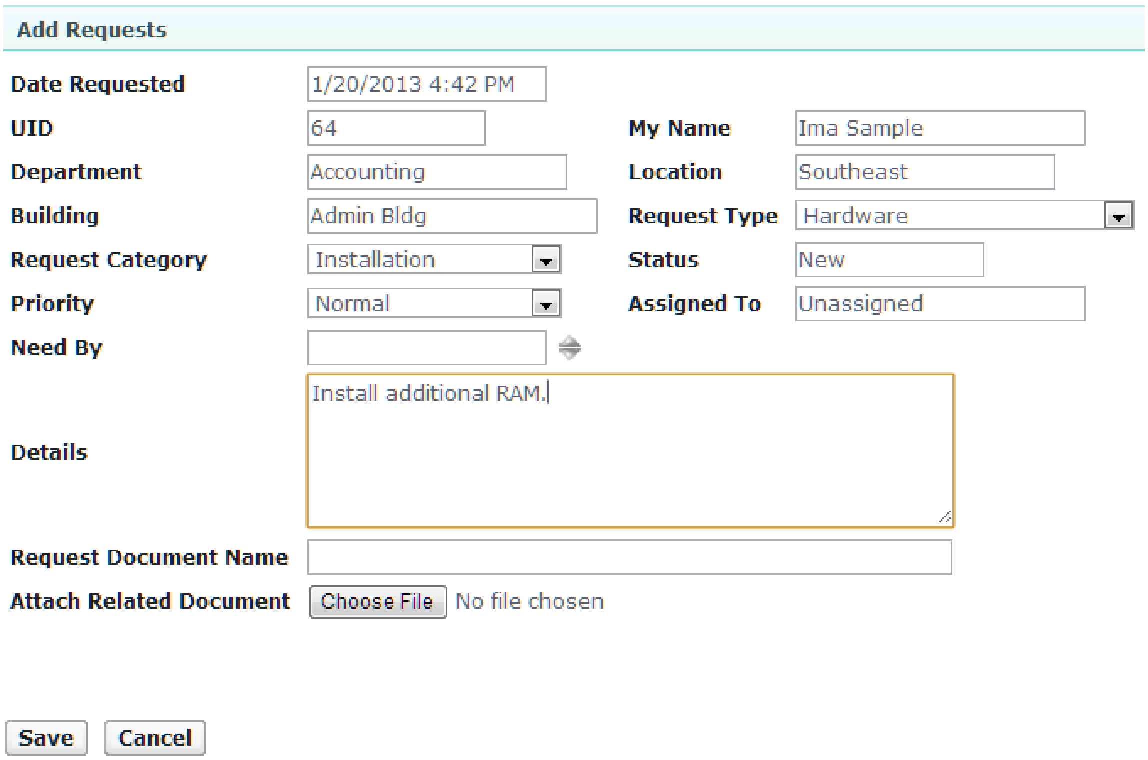
So when I am logged in as an end user, I see the screen below.



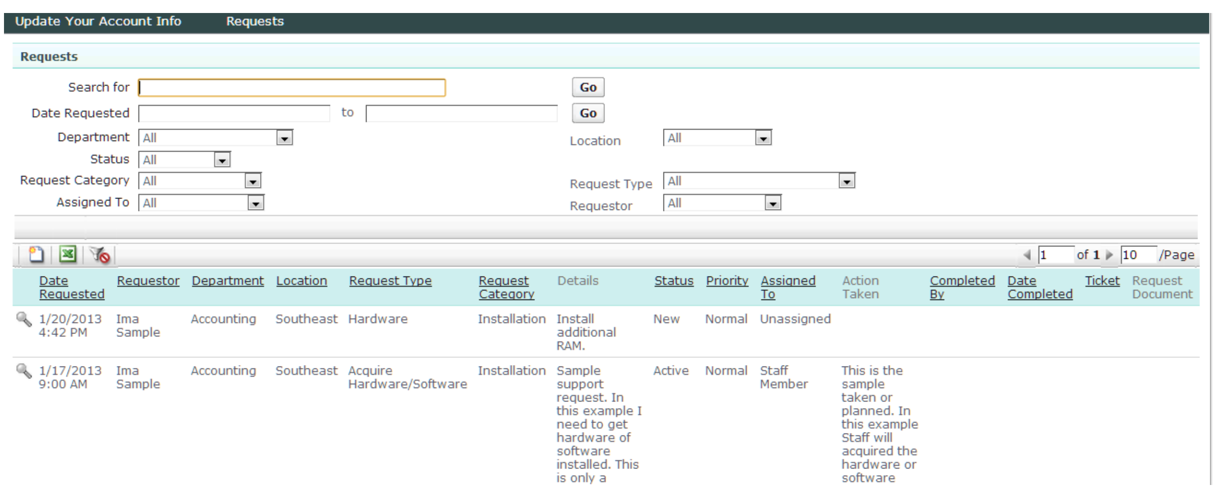
Before I start adding requests (an option under the Requests menu or clicking the New button, icon of a blank page) I will choose to Update My Account to correct the password. Other reasons end users might need to update their account is if they got a new phone number, changed their address or name, etc. The update your account screen looks like the sample below.



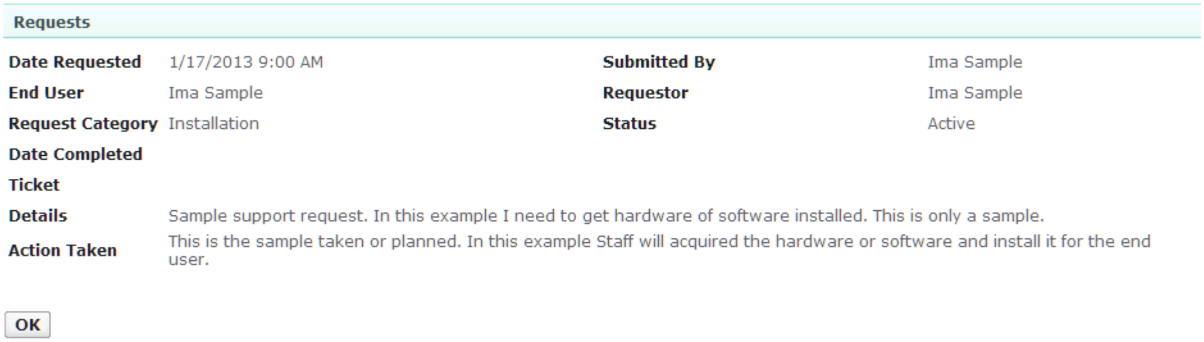
Now that the user has updated his profile, in the case to change his password he can begin adding support requests. In the screen below a lot of information was entered based on the user profile, the current date and time was used to fill in the date and time requested. The status defaults to New and the Assigned To field is Unassigned by default. The end user can select the Request Type and Category from drop down list boxes. The status will default to Normal but can be changed by selecting from the drop down list. A Date Needed, or Due Date can optionally be entered or selected from the pop up calendar. The Request Details cannot be left blank. This is a required field, and it is variable in length. The end user can enter as much or as little information as needed. The web interface provides the ability for uploading documents, such as a screen shot. There are many places where staff can attach documents and view documents already uploaded. These documents are stored in special fields in the database. NOTE: These cannot be accessed in the desktop based application.



So now the end user can see his request in the grid view.

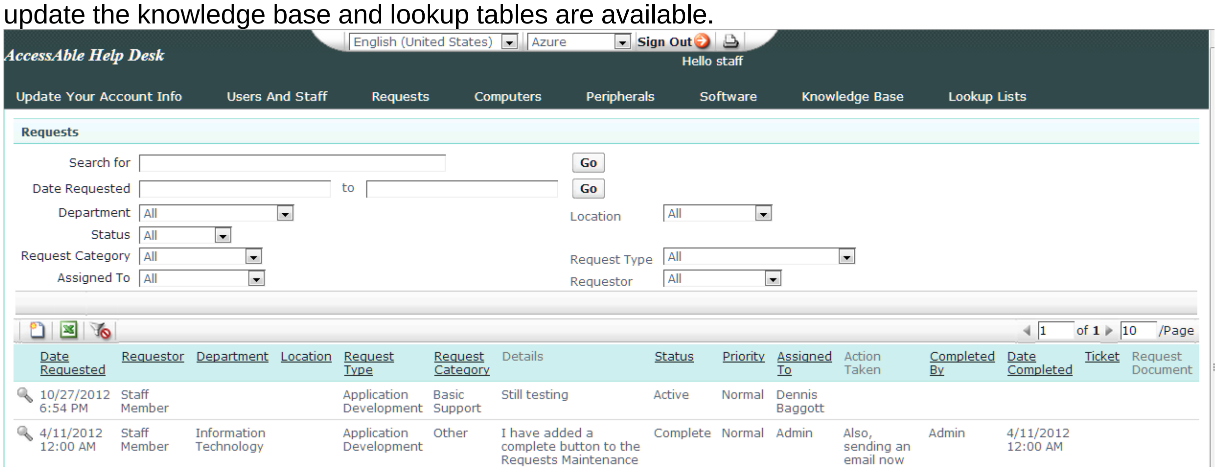


As the staff update requests, end users can come back to this screen and see the updated information. When the end user only has one or two requests in the grid, the ability to search or filter requests is not that important, however, as the user submits more and more requests the ability to search and filter data using the provided drop down list boxes, for example, becomes very useful. Also, the end user can use the button with an icon of a blank page to add new requests, can click the button to download requests to a Microsoft Excel formatted spreadsheet and the button to remove filter conditions will become more useful. A button with a picture of a magnifying glass can be helpful to let the end user view a request in a full page view. See the next screen.

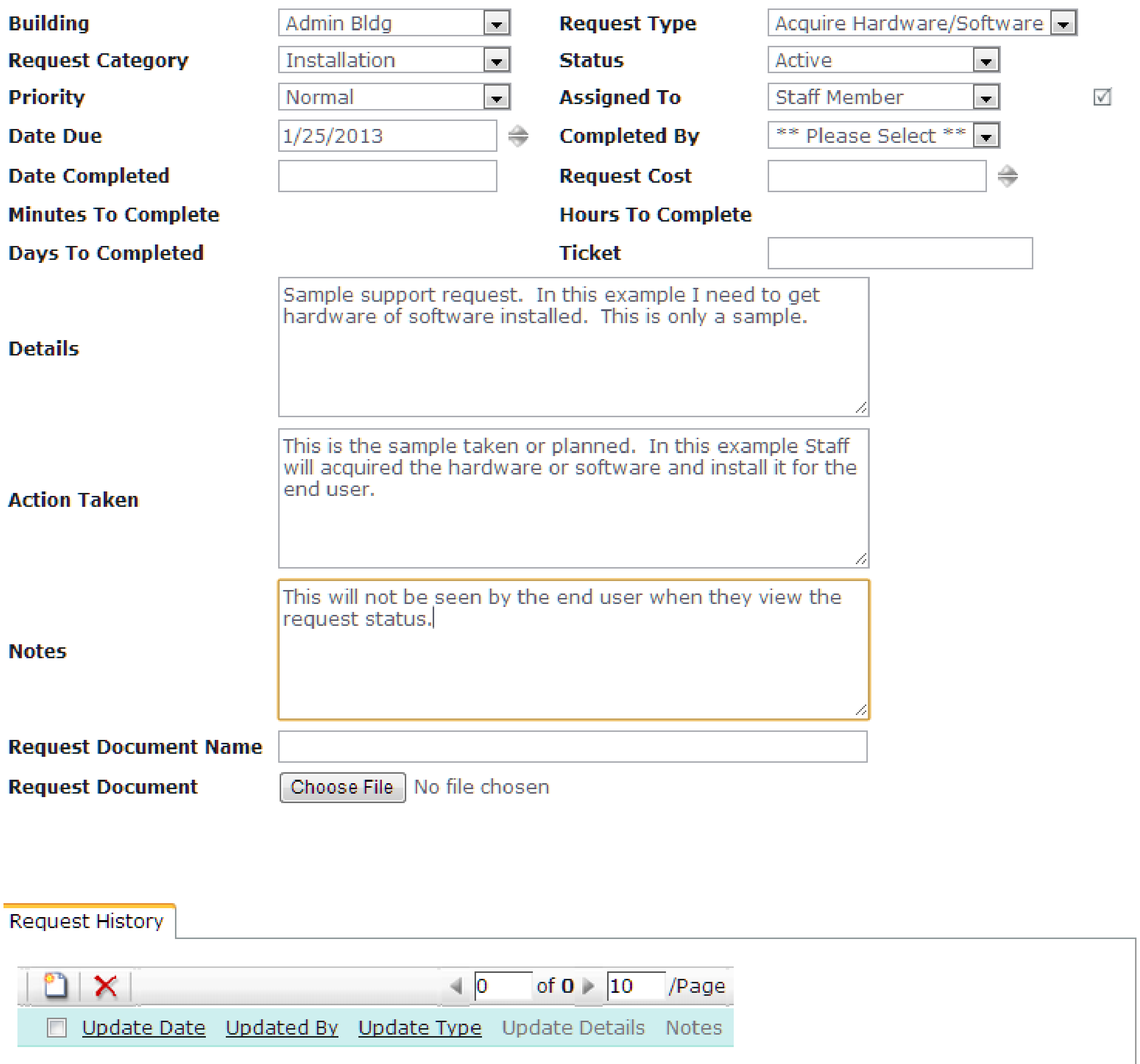


6.2 Staff Member Web Interface

When logged in as a staff member as I am now (login name of staff and password of member) I see a screen with requests I may have submitted, but also many additional menu options that allow for viewing the main files and lookup tables. Of course staff member can update his/her profile just as an end user can, but other options allow for viewing users and staff members, requests from all users as well as Computers, Peripherals and Software Inventory. Additional menu options for viewing and update the knowledge base and lookup tables are available.

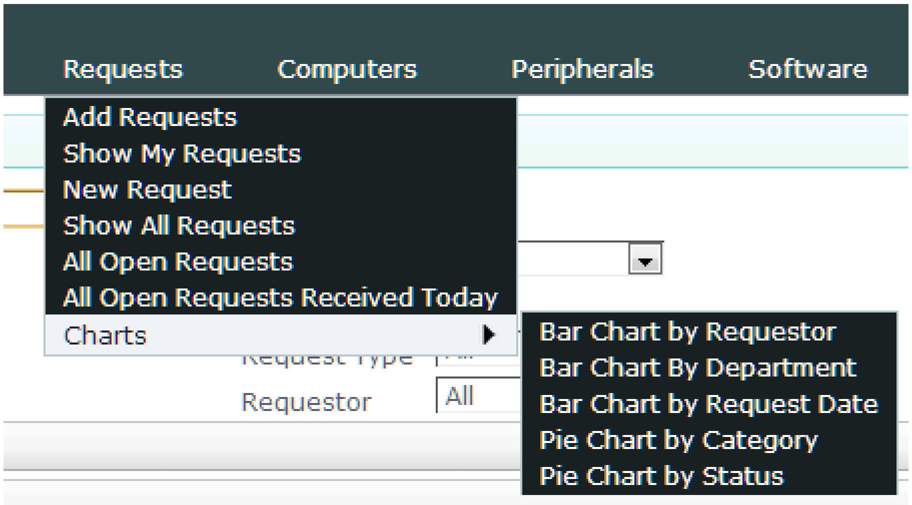


The next screen shows the Staff Member view of the request where he or she can update the request created by the end user. Many more items are available, such as the Action Taken or planned, as well as the ability to add and view request history about the request.

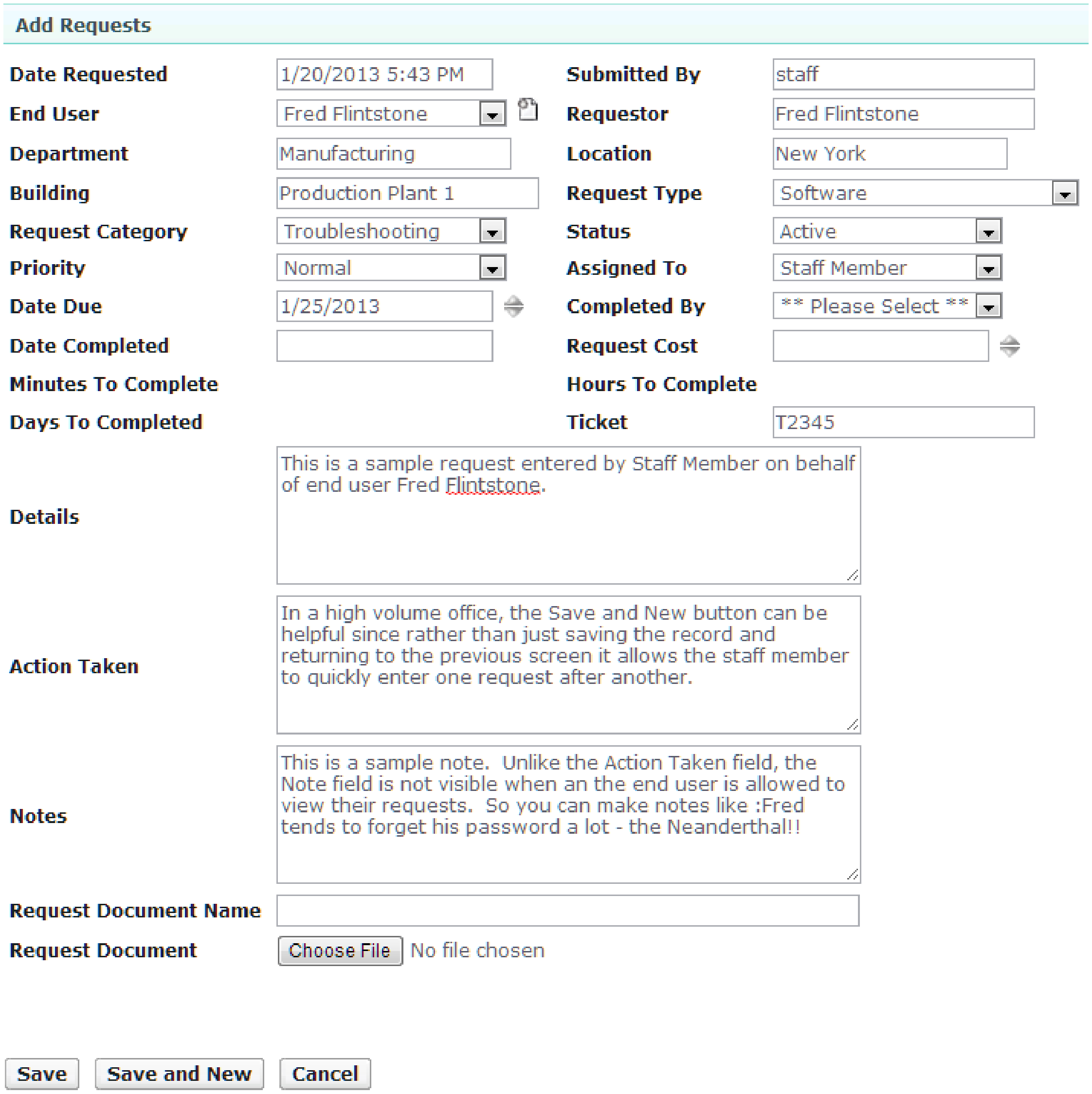


Note: On the screen above you will see fields to the number of days, hours and minutes to complete a request. These are calculated, not data entry fields, and they are not available in the desktop application.

The next screen shows drop down and fly out menu options available when the staff member chooses the Requests menu option.

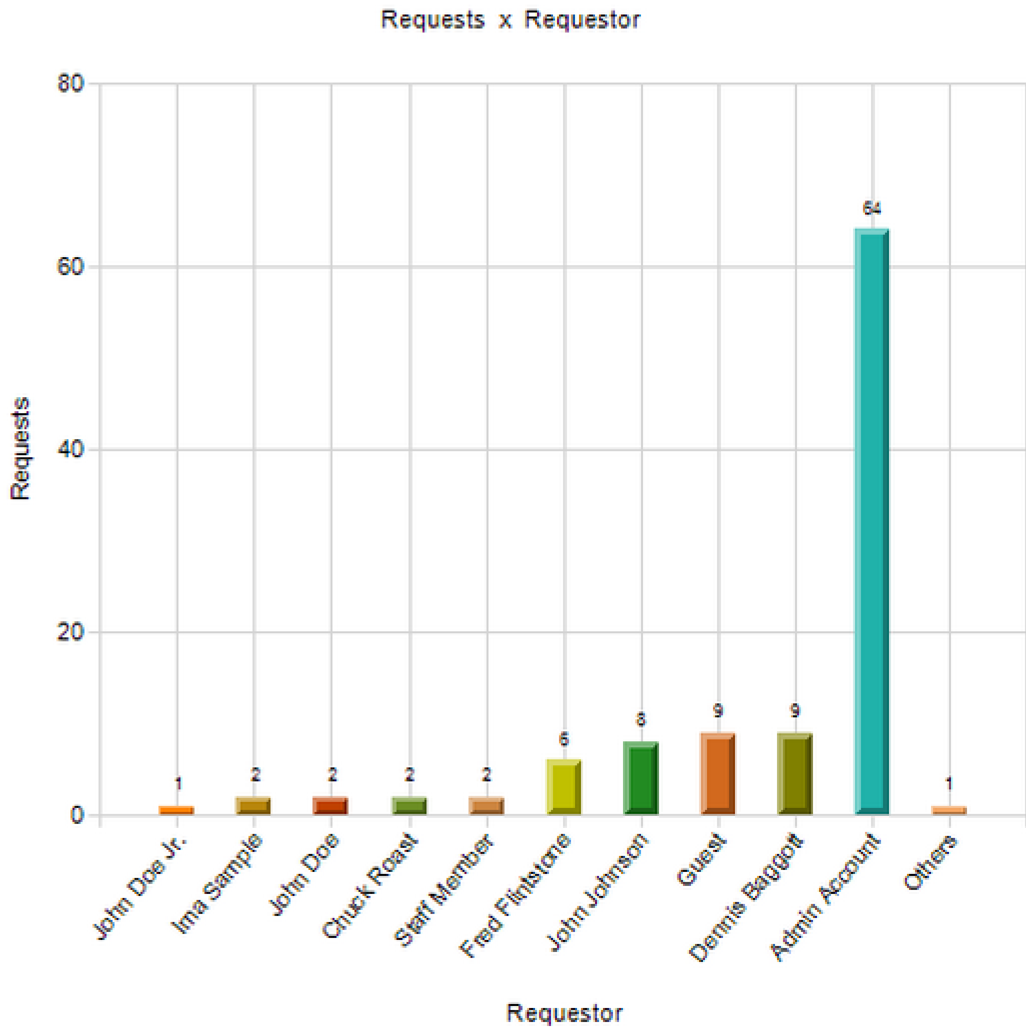


The first option under the Requests menu (Add Requests - unlike the screen for a New Requests) could be used by the staff member to add or view his/her own requests, but most often they will use this option to enter requests on behalf of an end user by selecting the end users name from the drop down list

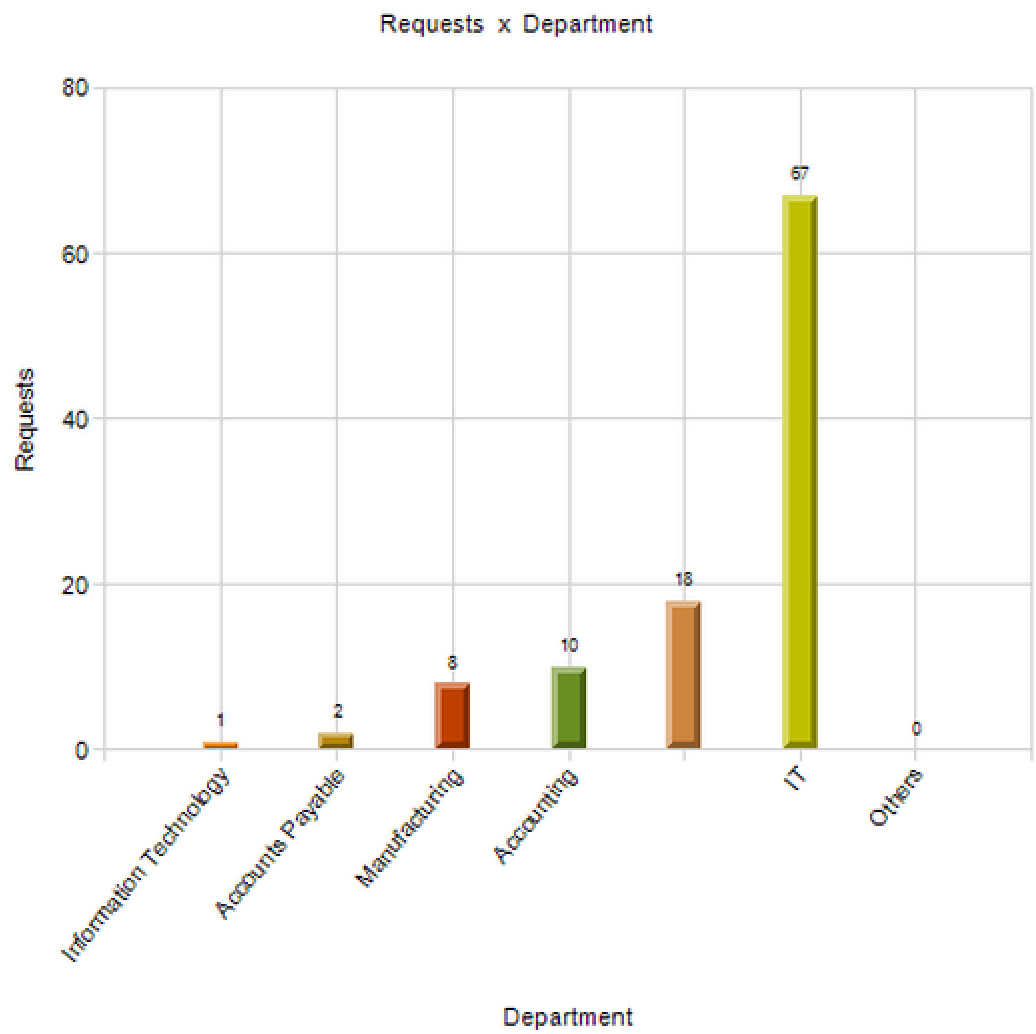


The next few options under the main Request menu option let staff view All Requests (regardless of status), view All Open Requests, and View All Requests Opened Today.

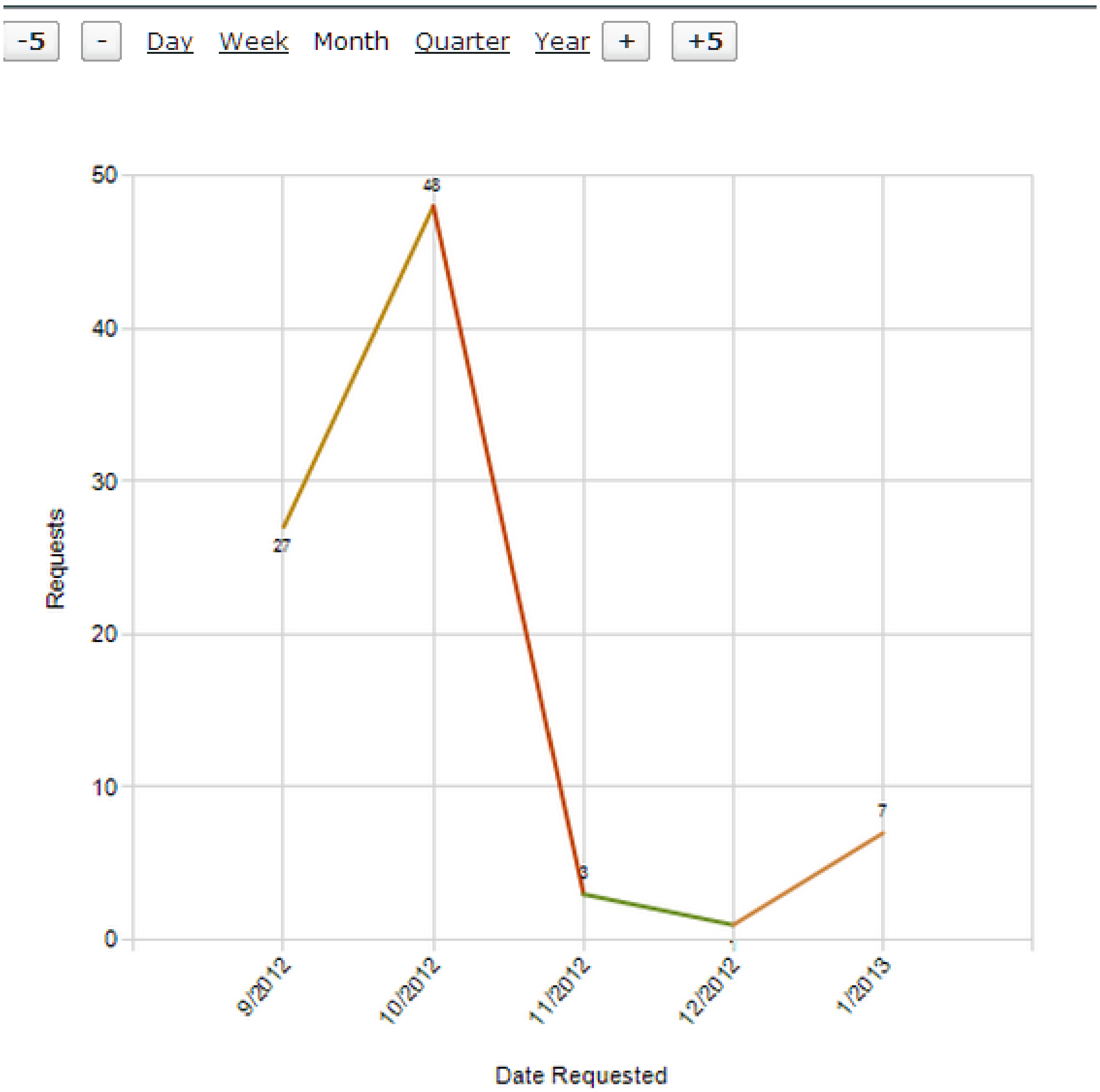
The first Chart option shown below presents the number of requests by the requestor. Click on a bar and a screen with the requests filtered to that requestor will be displayed.



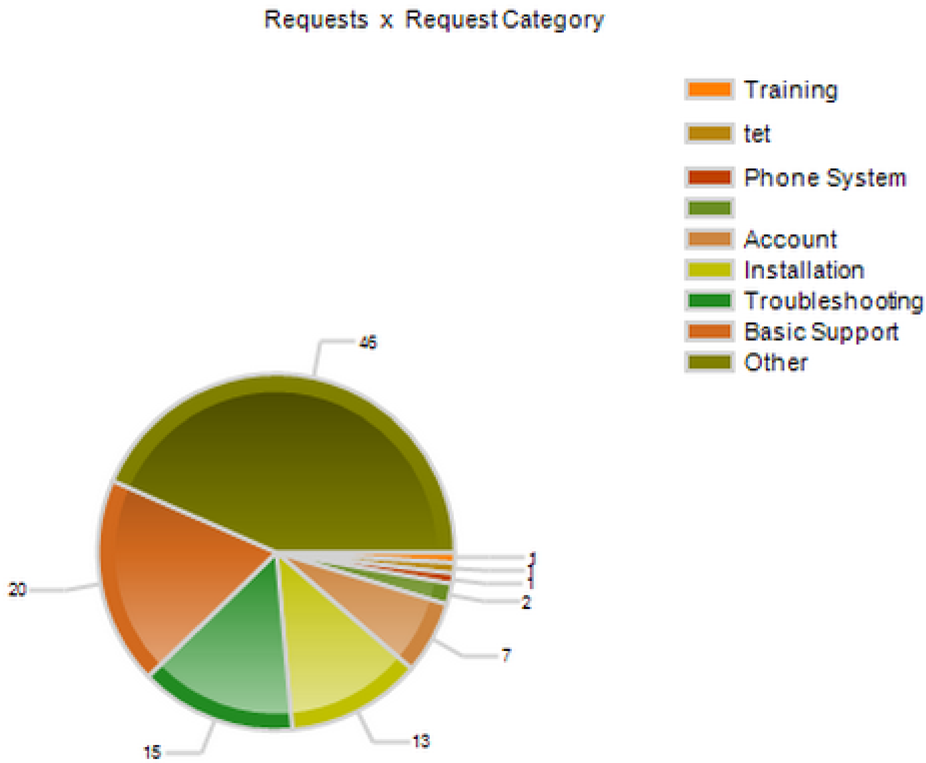
The next Chart is similar but it shows requests by Department. It is also interactive since clicking on a bar on this chart will display requests filtered by the department bar you clicked.



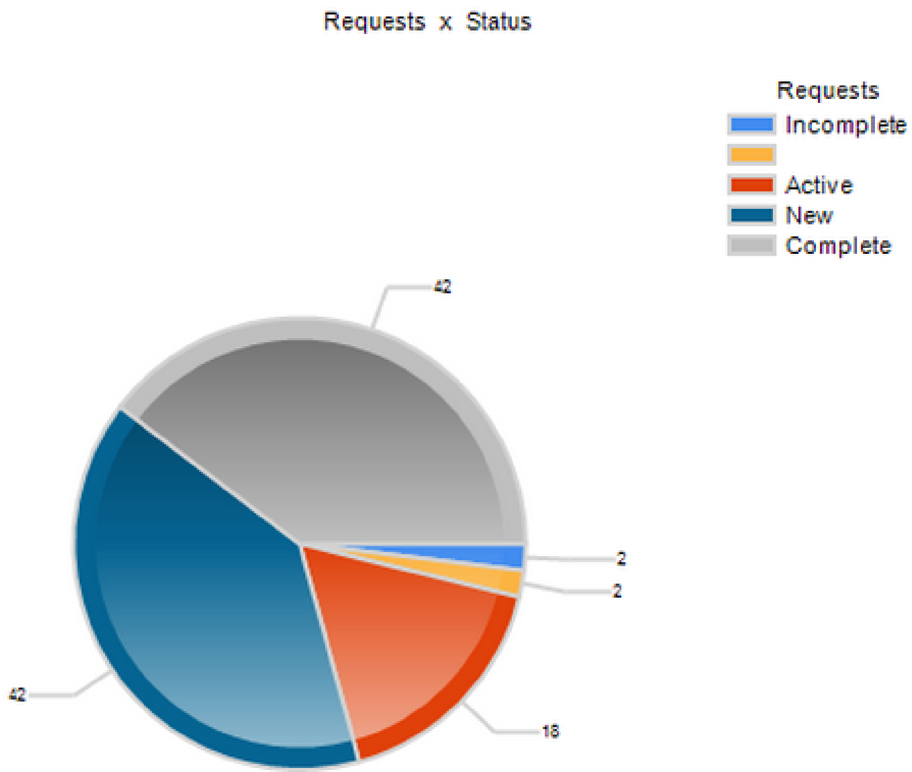
The third Chart on this list is a graph of requests by date. You can change the date to show requests, by Day, Week, Month, Quarter or Year. You can also move forward or backward by either 1 or 5 increments of the time period selected. Again, clicking on a bar will display a grid of requests filtered for the date range selected.



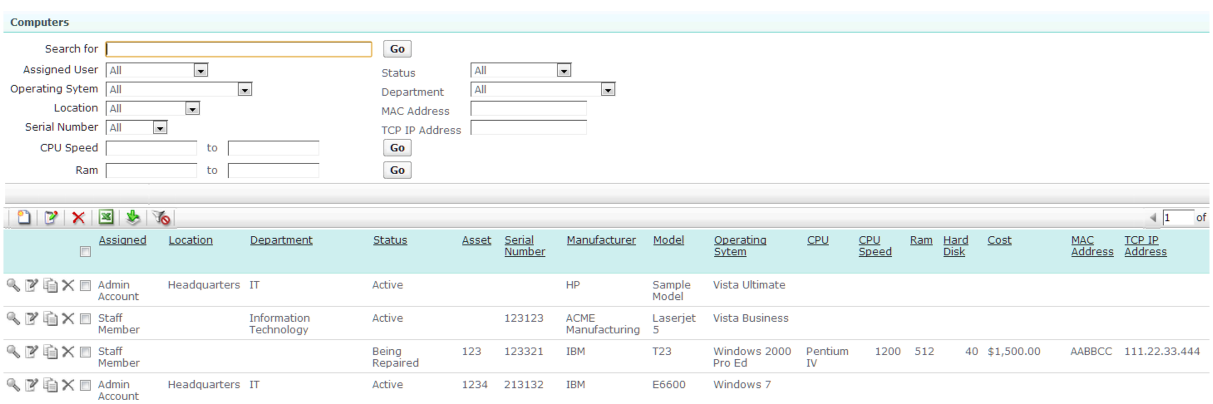
The next request Chart menu option will show requests by Category and the slices on the pie are interactive. Click a slice to open a grid filtered to that request category.



The final request Chart menu option is a pie chart of requests by Status. Again, this chart is interactive since clicking on a pie slice opens a grid filtered by Status.

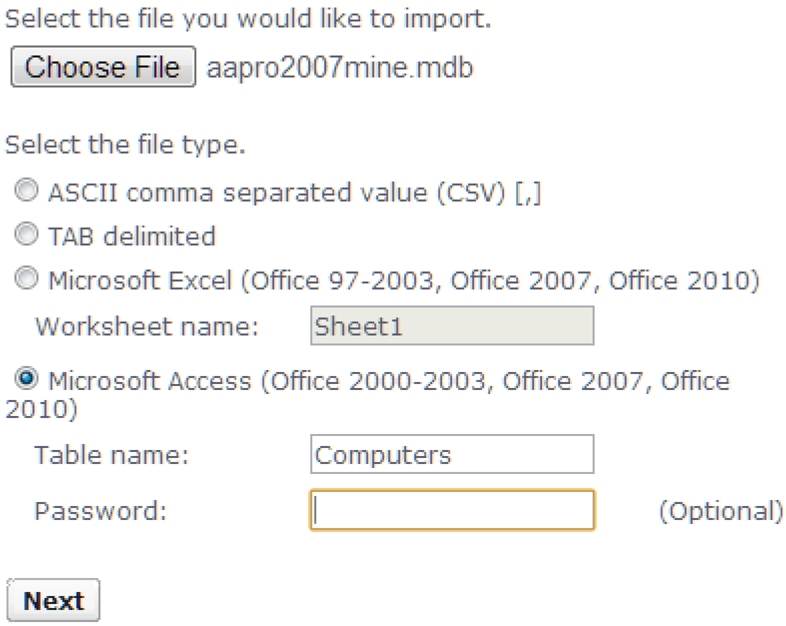


After the requests menu option is an option for Computer Inventory related tasks. Viewing Computer Inventory is similar to the other main file grids where you can filter or search using a variety of fields and sorting is available on many columns.
In addition to buttons to let you view Add, Edit and Delete records, a button is provided to export records to Microsoft Excel format, and a button to remove any filter condition, there is a button with an arrow pointing down that will let you use the Import Wizard to import records from a variety of formats. This option is included on many grids, but I will use this as an example to show some screens about the wizard.

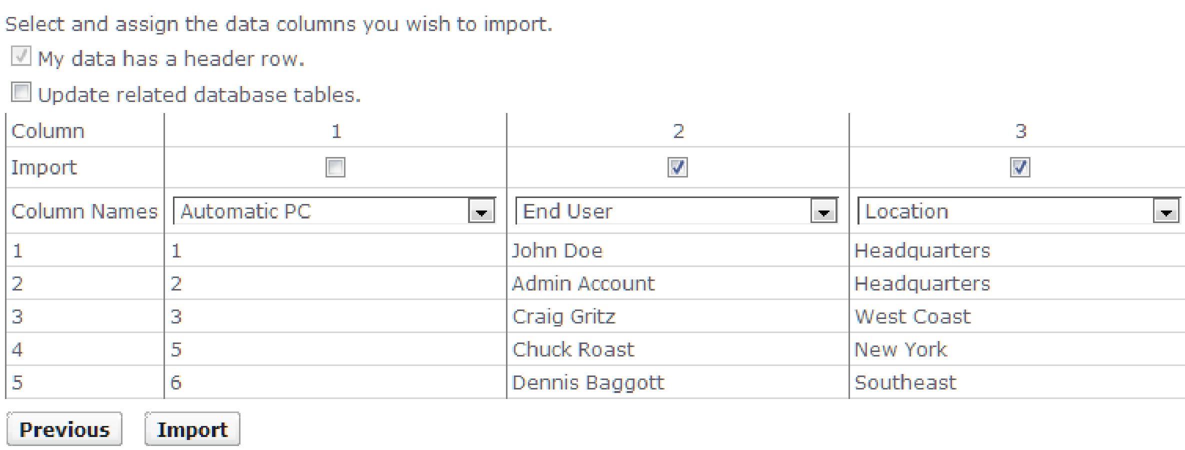


Assigned	Location	Department	Status	Asset	Serial Number	Manufacturer	Model	Operating Sytem	CPU	CPU Speed	Ram	Hard Disk	Cost	MAC Address	TCP IP Address
Admin Account	Headquarters	IT	Active			HP	Sample Model	Vista Ultimate							
Staff Member		Information Technology	Active		123123	ACME Manufacturing	Laserjet 5	Vista Business							
Staff Member			Being Repaired	123	123321	IBM	T23	Windows 2000 Pro Ed	Pentium IV	1200	512	40	$1,500.00	AABBCC	111.22.33.444
Admin Account	Headquarters	IT	Active	1234	213132	IBM	E6600	Windows 7							

In the screen shot below you can see that rather than a .csv or Microsoft Excel file I have chosen to import from a Microsoft Access format file. The default Table name is table 1, so you will need to enter the name of your table that you will be importing.



In the next screen shot you can see that the My Data has a header row is checked. For each column you need to select the corresponding column name and you will need to check the box for "import" for each column you want to import. Then click the Import button when finished. NOTE: You will want to be sure you have backups of your database in case the import does not work as expected. For example, it is easy to sometimes forget to check the box to import a column you had intended to import. Or you may have selected the wrong field name. The import wizard is offered because it may be helpful for some customers.


Select and assign the data columns you wish to import.

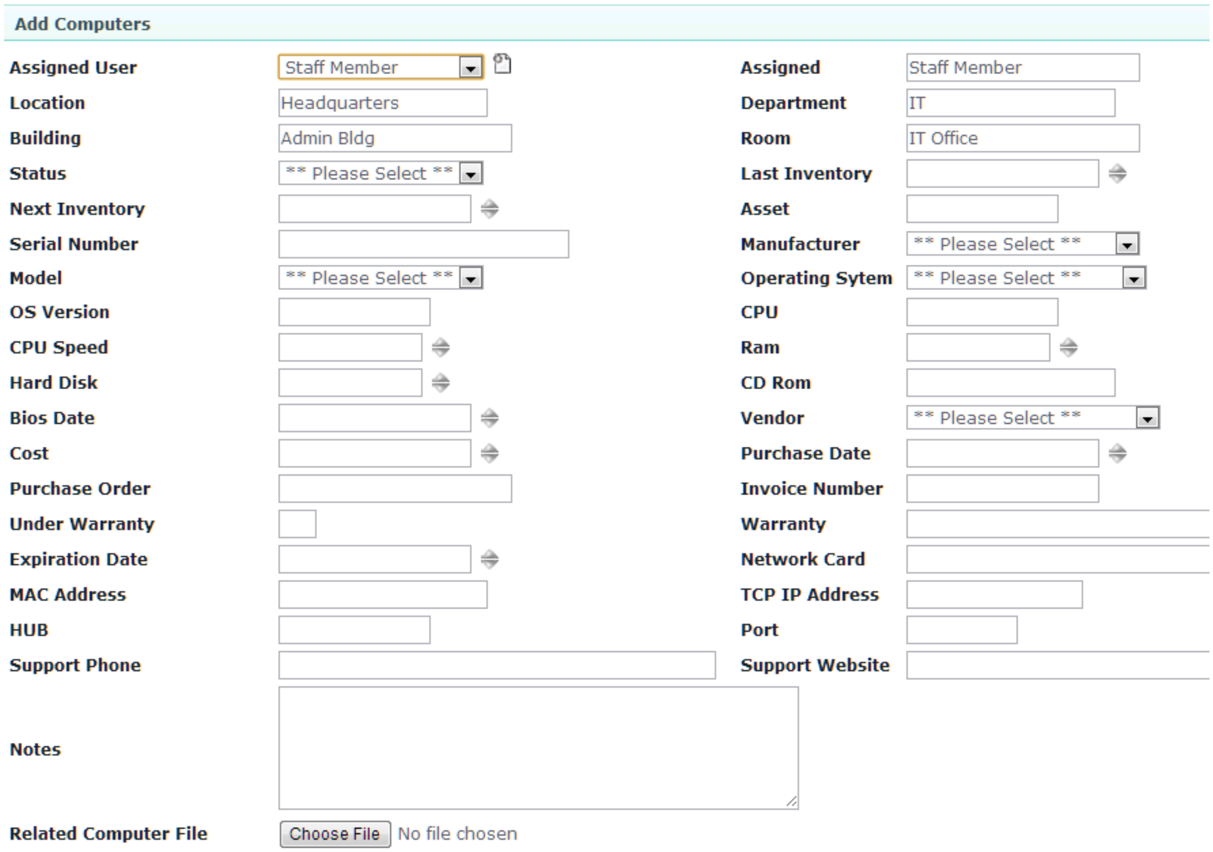
My data has a header row.

Update related database tables.

Column	1	2	3
Import	☐	☑	☑
Column Names	Automatic PC	End User	Location
1	1	John Doe	Headquarters
2	2	Admin Account	Headquarters
3	3	Craig Gritz	West Coast
4	5	Chuck Roast	New York
5	6	Dennis Baggott	Southeast

Previous Import

The screen below is used to add computer details. Like most screens, drop down list boxes are provided to select values for many fields. When an item like the Assigned User is selected, other items will be automatically filled in for you.

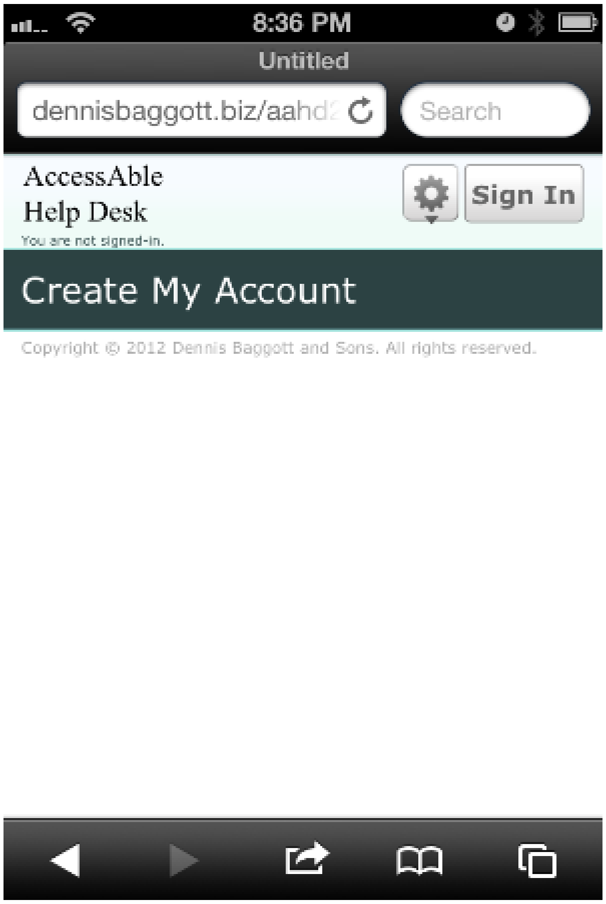


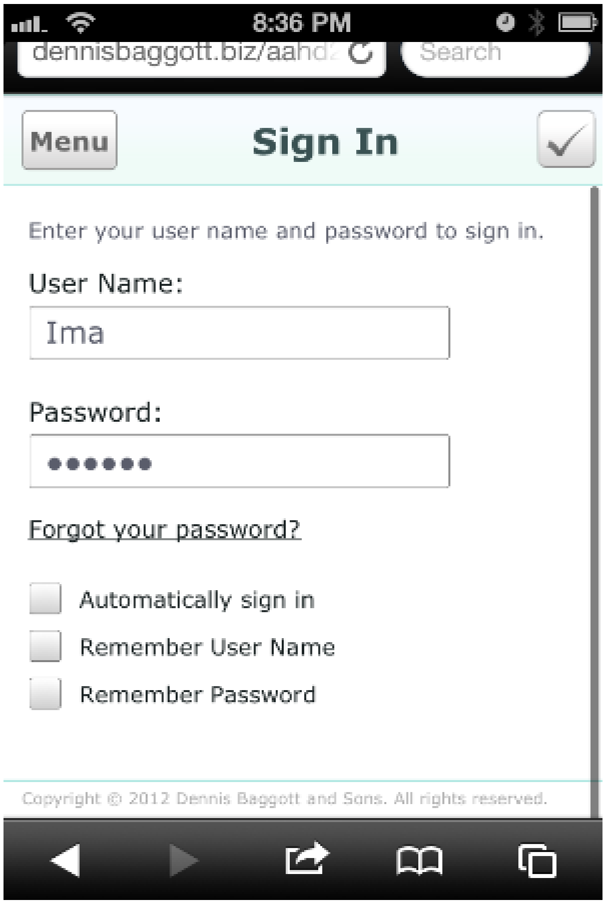
All of the web page screens are very similar so I will not continue to include screen shots from each of the main files. In addition to web pages for the main files, I have provided web pages to allow you to easily edit the Lookup Tables. In fact, it may be a good idea to begin using the lookup tables to get used to the web interface and because it will be helpful to have appropriate lookup table values available when entering data for the main files.

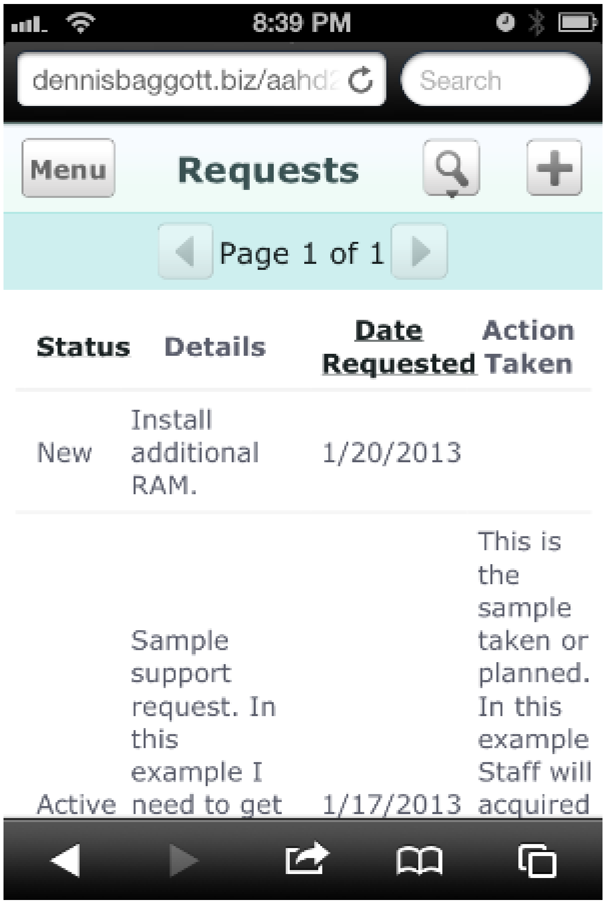
6.3 Mobile Web Pages

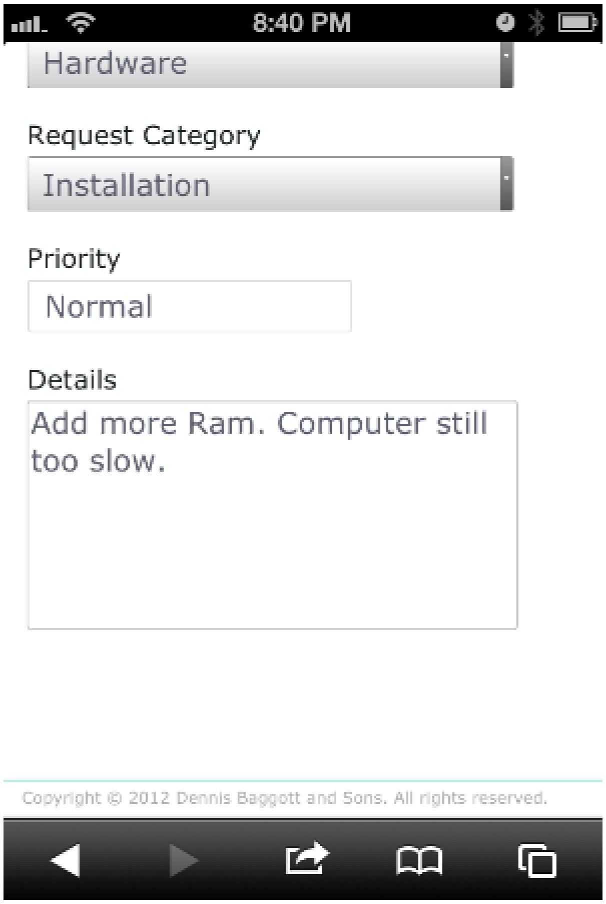
As you can see in the screen shots below, the mobile web pages include a similar start page with the option to Create a New Account or Sign In.
If logged in as an end user you will be able to view your requests, or submit a new support request. You also have access to the settings option to choose
a different color scheme or language. When logged in as a Staff Member you will have many more options available.

Feedback from registered users of AccessAble Help Desk 2012 will help me determine if I make modifications or additions to the mobile web interface.


8:36 PM
Untitled
dennisbaggott.biz/aahd
Search
AccessAble
Help Desk
You are not signed-in.
Sign In
Create My Account
Copyright © 2012 Dennis Baggott and Sons. All rights reserved.


8:36 PM
dennisbaggott.biz/aahd
Search
Menu
Sign In
Enter your user name and password to sign in.
User Name:
Ima
Password:
Forgot your password?
Automatically sign in
Remember User Name
Remember Password
Copyright © 2012 Dennis Baggott and Sons. All rights reserved.


8:39 PM
dennisbaggott.biz/aahd
Search
Menu
Requests
Page 1 of 1
Status
Details
Date Requested
Action Taken
New
Install additional RAM.
1/20/2013
Active
Sample support request. In this example I need to get
1/17/2013
This is the sample taken or planned. In this example Staff will acquired


8:40 PM
Hardware
Request Category
Installation
Priority
Normal
Details
Add more Ram. Computer still too slow.
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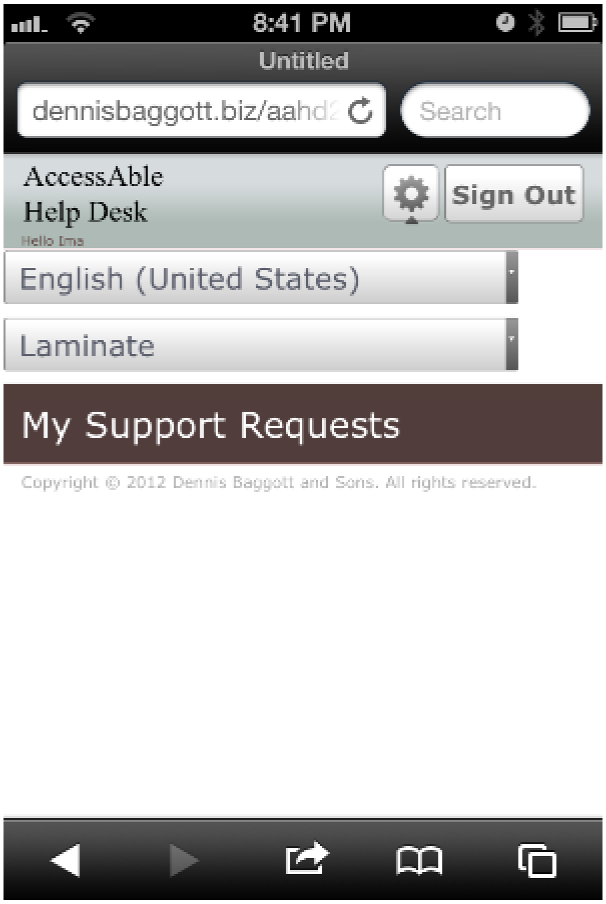
8:41 PM
Untitled
dennisbaggott.biz/aahd
Search
AccessAble
Help Desk
Sign Out
English (United States)
Laminate
My Support Requests
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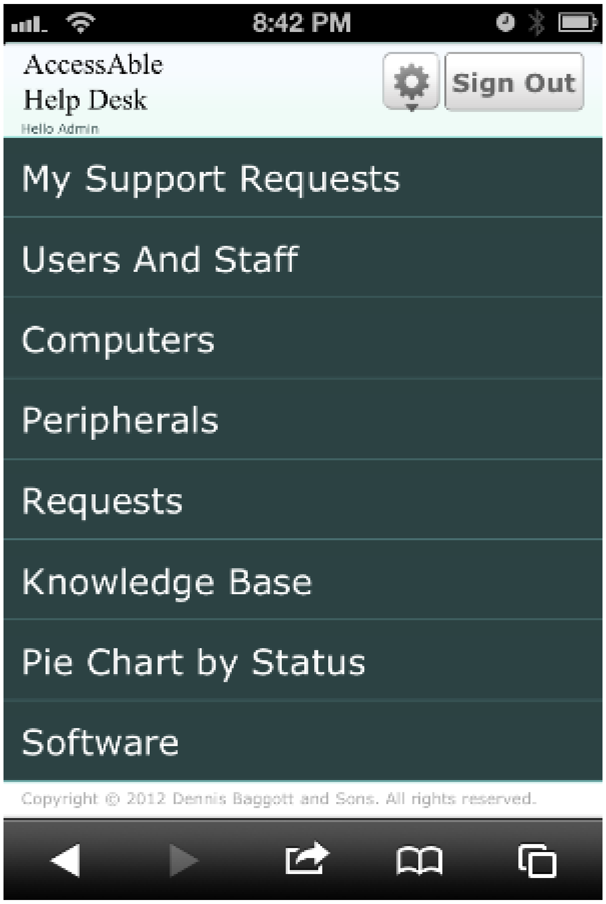
8:42 PM
AccessAble
Help Desk
Hello Admin
Sign Out
My Support Requests
Users And Staff
Computers
Peripherals
Requests
Knowledge Base
Pie Chart by Status
Software
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