ITJournalPro2

Instruction Guide

BigaBytes
Salt Lake City, UT
http://www.bigabytes.net

Contents

Introduction

IT Journal Pro is a FileMaker-based inventory and ticketing solution for small– to mid–sized companies. IT Journal Pro can assist your business, specifically the computer support department, by keeping track of assets and support requests. IT Journal Pro is the first step in providing an accurate account of when, where, and how your IT resources are being used.

As an Open FileMaker Solution, once purchased, a password is provided and includes full access to all areas of the solution. With a copy of FileMaker Pro, you will be able to change layouts, reports, scripts, fields and other areas of the solution.

Logic

To use IT Journal Pro effectively, it's important to understand the logic behind its design. Having the opportunity to develop similar solutions for private companies, I've utilized that knowledge and experience to build a custom solution from which others can benefit.

The first thing to understand is the logic behind the relationships between tables. The main relationships in IT Journal Pro are based on automatically created unique numbers (FileMaker calls this a "serial number"). Each created record will get one of these numbers. In the Users table you will see a User ID field, which is created when the record is created. Similarly, in the Workstation Table/Layout you will find that a Workstation ID is also automatically created when a record is generated. By using these two numbers as basis for the relationship there is very little chance of getting inaccurate data in the future.

To manage a user with multiple computers, there is a hidden table (a merge table) that creates a unique ID number for each user+workstation record created. This ID number works behind the scenes to keep track of request tickets that belong to a specific workstation.

Some people have asked to use an office number or a phone number as the unique ID number for a user; however, this is not a good idea because those numbers can change. For example, people move into a different office or leave employers for new jobs. When a replacement is hired, they will inherit the previous employee's phone number and or office number, but not necessarily the computer to which the database record is related. Similarly, it is not good practice to base relationships on names. Perhaps a person gets married and their name changes or two people with similar names work in the same office. These are just some of the reasons IT Journal uses automatically created ID numbers.

People Centric

IT Journal is also designed to assist IT staff in providing the best possible support to a user. This means everything in the database revolves around the user. To assign anything (from a computer, display, software or a support ticket) to a user, insert their User ID number into the User ID field on any layout and that item will be assigned to that person.

Keeping track of things in this manner allows you to have access to that person's computer configurations with the least amount of effort. By finding a user in the Users layout, you can quickly access their workstation, peripherals, installed software, and see if they have any outstanding service calls within a matter of seconds.

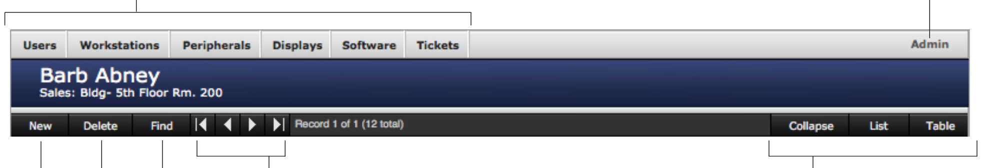
FileMaker Terminology

Database	A database is a collection of information, or data, that you can organize, update, sort, search through, and print as needed. Your own address book or filing cabinet is an example of a simple database. With the address book and filing cabinet, you store similar pieces of information that are organized for easy retrieval. With a filing cabinet, you must choose a way to sort your data, for example, alphabetically by last name or by region. By storing contacts and addresses in FileMaker Pro, you can organize your information in many ways. You can sort your information by country, city, last name, or even sort by all three of these fields.
Tables	A database table contains one or more records. Each record contains fields that hold similar information about one subject or activity. For example, the fields on a record in the Clients table contain address information for one client.
Layouts	Essentially the user interface. In FileMaker, you can have many layouts to show the records in many different ways. Examples are form, list, and table views. FileMaker also makes it easy to create label and envelope layouts.
Fields	These are the basis of a database table. Fields are used to store, calculate, and display the data you enter into a record. Each piece of information in a record—like name, ID number, and telephone number is stored in a field.
Records	Each set of fields is called a record. To enter data in a database table, you make a new record and enter values into the fields that belong to that record. Values can be typed into a field, imported from another application, or entered in a number of other ways.
Portals	A layout object that displays records from related tables. Portals display data from related fields in rows, one record in each row.
Container	A field that can store files such as documents, graphics, sounds, PDF files and movies.

Window Controls

Navigation Buttons
Switch between the different tables to view and manage your data.

Admin Controls
Switch to the admin layout to manage users.



Action Items
Buttons to perform specific tasks on the current table.

Record Navigation
Use these buttons to advance forward or backward to the first or last record or one record at a time.

Layout Switches
You will find these on most layouts; allows you to view data in a detailed, list, or table view.

Almost every layout that you will be using will have these features at the top to assist you in working with the database. Although it may seem like a very basic concept, getting to know what these buttons do will make working with IT Journal Pro 2 a breeze.

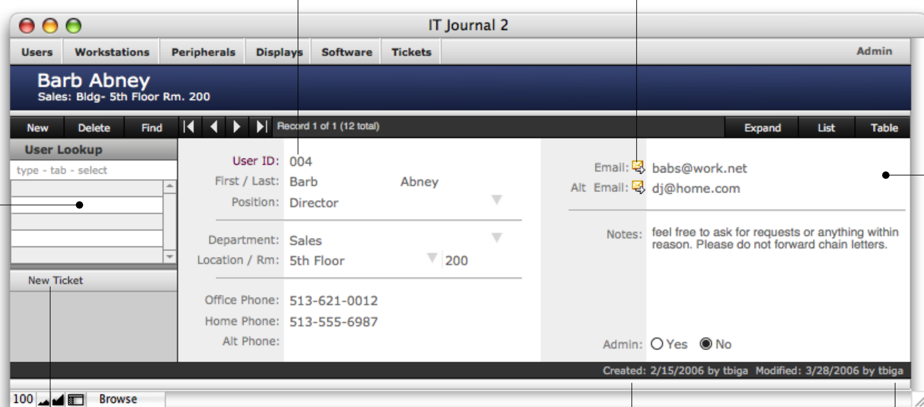
Navigation Buttons:	Use these to switch between specific layouts / tables.
Admin Controls:	This is a new feature in IT Journal Pro 2 to allow you to manage who has access from within the database.
Action Items:	Use these buttons to create, delete and find records.
Record Navigation:	Use these buttons to navigate through the database: forward or backward to the first or last record or one record at a time.
Layout Switches:	Change how you see the data that you are viewing. See it displayed as a detailed record, a list view or a table view.*

** Table view is not a type of layout; it's a view of your data in a spreadsheet-like grid format where you can quickly rearrange fields in Browse mode. For example, you can quickly reorder, resize, or sort columns (fields) with just a mouse click.*

Users Window

User ID
A unique number for each person.

Email
Opens a new message in the default email program.



User Lookup
Type a few letters. Press 'Tab' to populate the list. Select the name you are looking for.

User Information
Manage detailed information about each person you support.

As an Open Solution, you can modify the fields or add more fields to create a more customized solution.

New Ticket
These buttons will create a ticket assigned to the user only.

Record Tracking
See who created a record and when it was modified.

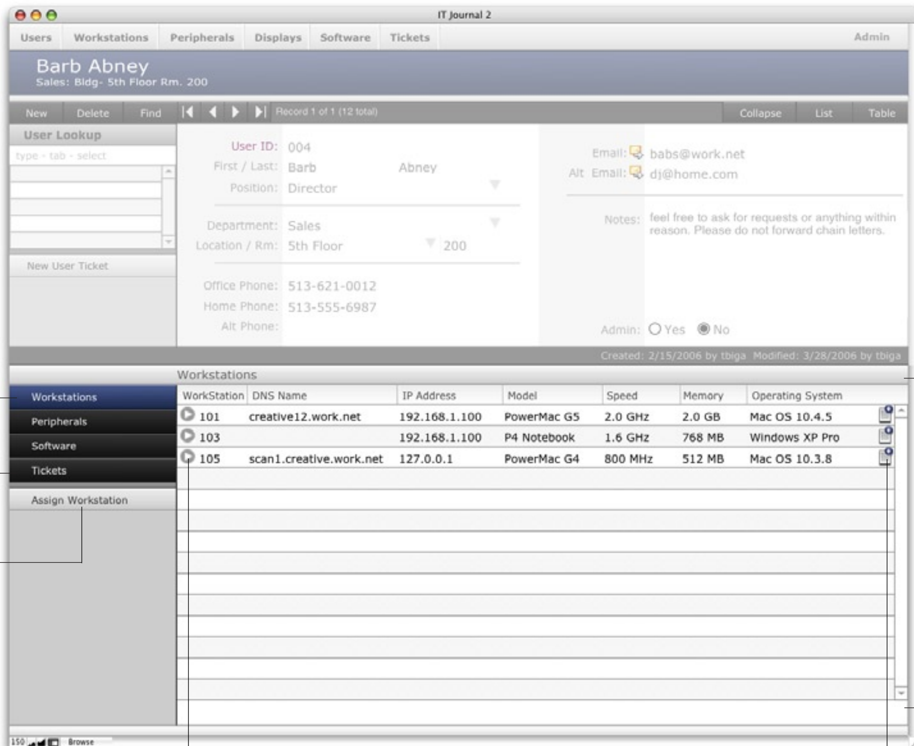
User ID: An automatically generated unique number for each user you support. If your organization has employee ID numbers, the database is easily changed to use the number of your choosing.

User Lookup: Quickly find anyone in your database. Just type in the first few letters of their first or last name and press tab. A list of users with similar names will appear find the one you are looking for, click on the name and quickly jump to their record.

User Information: Store all the important information about each individual you support. Pop-up fields can be customized to your needs. Clicking the icon next to the Email or Alt-Email field will open up a new email window using your default email program. The Notes field can store information about the person that is unique to the individual. The Admin radio buttons are to keep track of use who may have Administrator access priviliges on their computer.

Record Tracking: This will let you know who created a record and on what date it was created. If the record is modified it will show you who made the most recent changes and on what date they made those changes.

Users Window Extended Details



Portal Buttons
Use these to switch the layout to view related data.

Related Actions
These buttons are dependant on the portal that you are viewing. Use them to create new related records based on the current user.

Portal Details
This area is a portal to related information about items assigned to a specific user.

Goto Record Detail
Use the arrow button to go to the record details. Each record in the portal will have its own button.

New Ticket
Create a ticket related to this device and user.

Portals allow you to view additional information about the user. Each portal pulls data from the Workstation, Peripherals, Software or Tickets table to show you what is assigned to the person who's record you are viewing. From within the portal you are able to click on a record detail button, go to the related table and view the full details of the item selected. Also by clicking on the New Ticket button you can create a new support request related to the person and the device allowing for greater issue tracking abilities.

Workstation Details

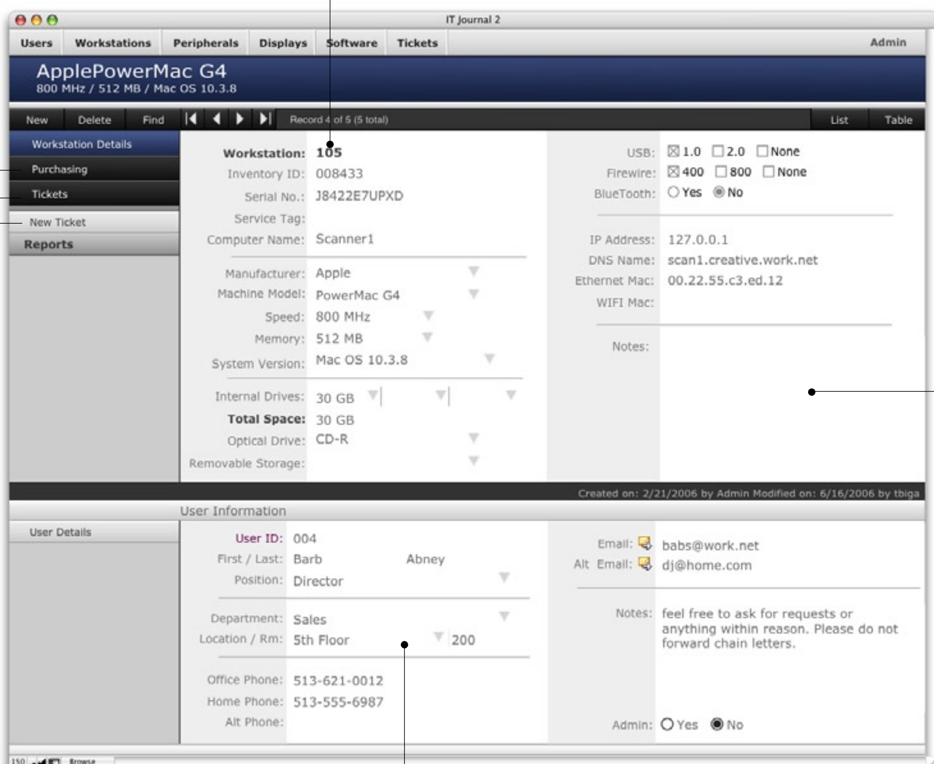
Managing your company's IT assets has just gotten easier. In Workstation layout, keep track of all the important details regarding your company's computer hardware. FileMaker lets you search any field so it's easy to locate a single workstation or many workstations with common features.

Workstation ID
This number is automatically generated when a new record is created.

Purchasing
Keep track of when, where and how the equipment was purchased.

Ticket
See tickets related to this piece of hardware.

New Ticket
Make a new ticket based on the current Workstation ID.



Notes
Add any additional details or comments about the hardware.

Assigned User
Typing an existing users ID number into the User ID field will automatically populate their details.

Inventory ID: Used if your company has its own labeling system. Just like other fields, it can be used or disregarded.

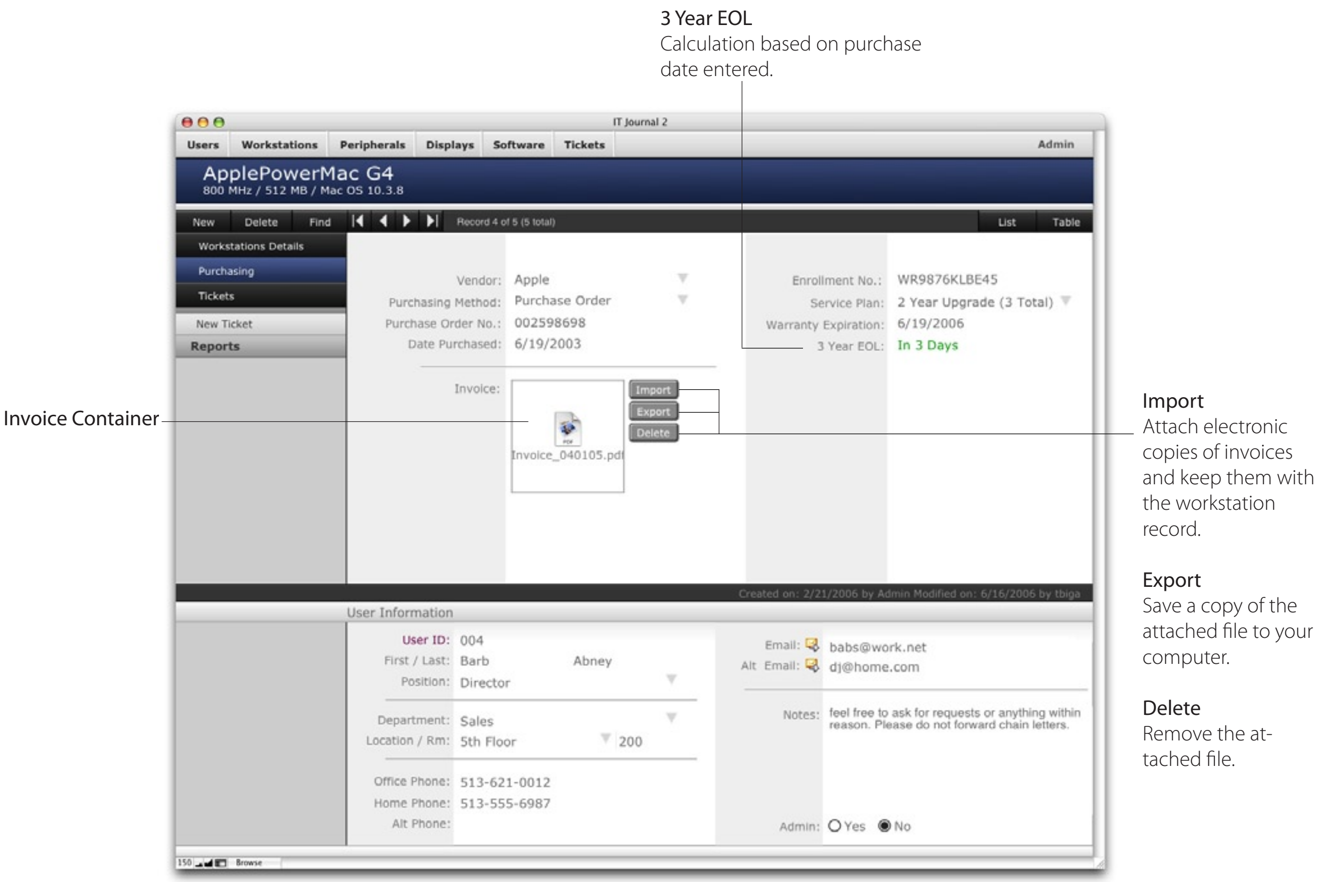
New Ticket: This button will create a new support ticket assigned to the workstation and the person making the request. It is useful for developing a history of potential issues with a computer.

Assigned User: Entering a person's User ID number into the User ID field will create a relationship to that user and show their details with the workstation.

Reports: There is extra room in the layout to create buttons for your own specialized reports. Copy and modify an existing button to match the interface.

Workstation Purchasing

In addition to keeping detailed information about hardware, you can also keep a detailed record of when, where and how a computer was purchased. Attach electronic copies of your invoices and store them with the workstation record. This will be useful when a computer needs service while still under warranty.



Many companies have a target to replace equipment after 3 years of duty. IT Journal calculates a 3 year EOL (end of life) cycle based on the purchase date. This can easily be changed to a 4 or 5 year EOL if desired.

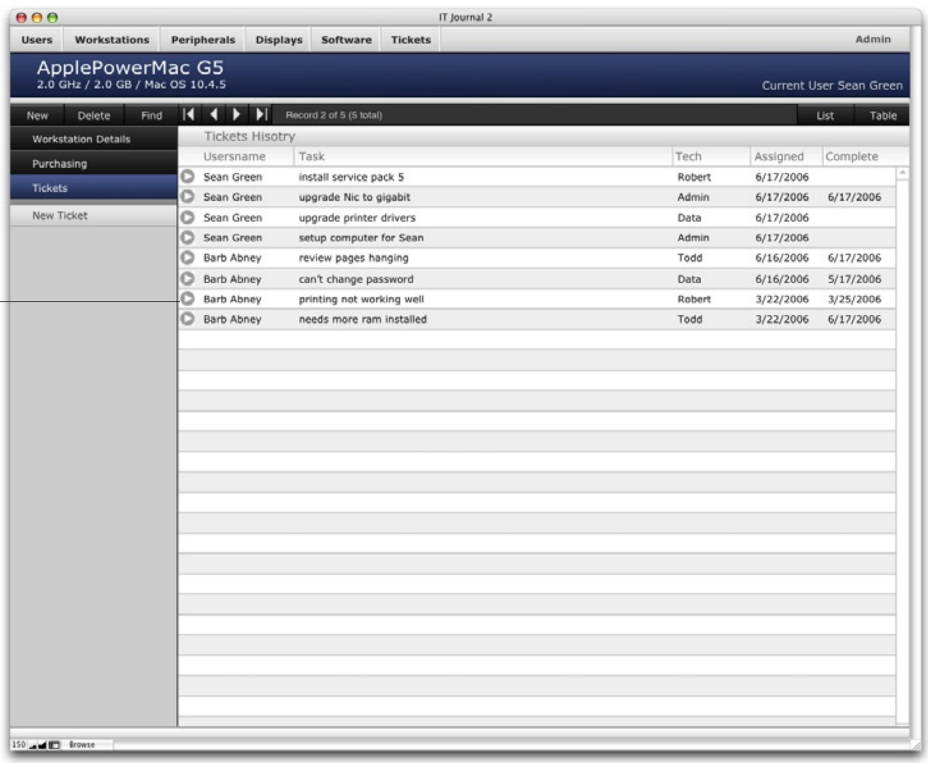
The invoice container is controlled by Import, Export, and Delete buttons to the right of the invoice container to help prevent accidental deletion of an attached file.

This layout has also been left with a lot of open space to add fields if necessary. The name of the tab can also be changed from “Purchasing” to reflect a more general set of fields that meet your specific needs.

Workstation Tickets

The Workstation ID allows IT Journal to track all issues related to a unique ID. This will allow you to see a history of issues related to the hardware, even if it is reassigned to a new user. This history can be very helpful when trying to determine if a computer might be exhibiting issues related to hardware and not an issue related to software or user error.

Record Detail
Use the arrow button to go to the record's details. Each record in the portal will have its own button.



Within the portal, select the arrow to the left of the user's name and it will direct you to the Tickets table to view the detailed information about that specific incident.

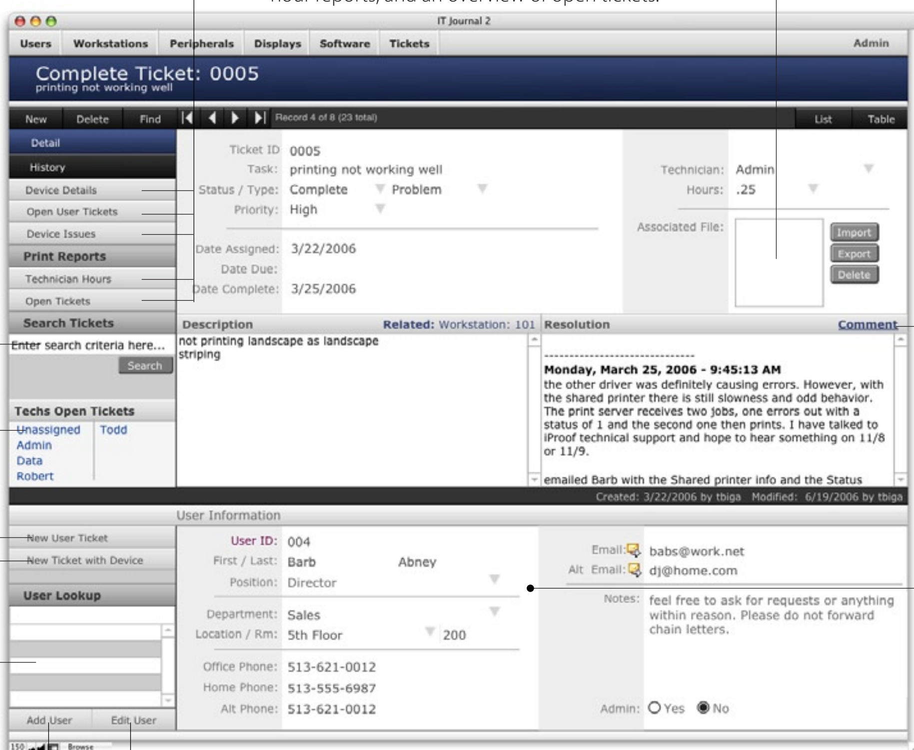
Ticket Details

Ticket Details will log the progress of a request made of your help desk staff. Ideally all calls coming into the help desk should be tracked. No matter how insignificant a call may seem, it took resources to answer the phone and respond to the call. Each ticket should be assigned to a user.

Keeping a history of requests is important. The fields defining a user are not based on a simple relationship, but are values that are 'looked up'. If this information were based on a simple relationship it would possibly end up with inaccurate or lost data as User information changes.

Details and Reports
View related details about tickets, technician hour reports, and an overview of open tickets.

Associated File
Attach a copy of a problematic file or a file that deals with the assigned task.



Search
This will search within the Task, Details and Resolution fields looking for similar tickets.

Assigned Tickets
Click on a name to view open ticket for that technician.

New Tickets
Create a ticket for just the user or the user and the current device.

User Lookup
Type a few letters. Press 'Tab' to populate the list. Select the name you are looking for. This returns results from the Tickets Table not the Users Table.

User Details
Use these buttons to edit user info or add a new user to the database.
See page 13 for details

Comments
Use this button to insert a time and date stamp after adding comments.

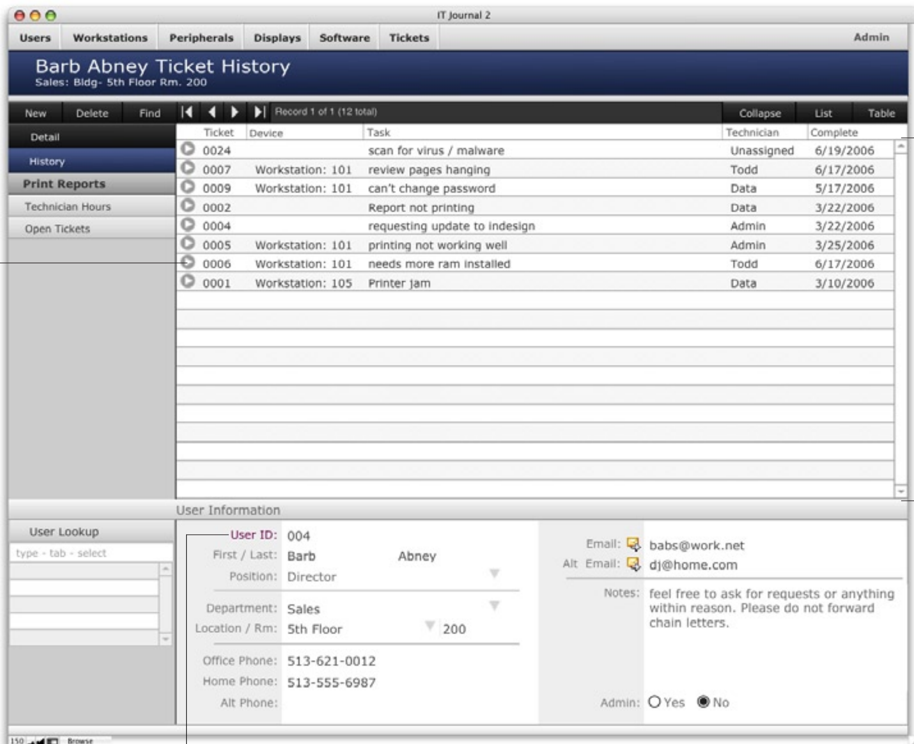
User Details
Values are "looked-up" to retain the information in the tickets table even if the user is removed from the Users table.

Upon creation, a new Ticket will have a default status of Open and technician of "Unassigned". When a Technician is assigned, the current date is entered in the Date Assigned field. When the Status is set to Complete, the Date Complete field will reflect the current date. Hours are provided to track a technician's time spent on a project, if it is necessary to bill back to a specific job.

Note: *Fields that are auto-populated may rely on specific data being entered into other fields to determine their value. If you change the values of some fields, it may break the auto-populated fields.*

User Ticket History

The User Ticket History layout has been included to help determine if there is a pattern with requests coming from individual users. It can be used to identify a training need and potential software or hardware issues with the computer. In a department with multiple technicians, it can also be useful to see who has helped the individual in the past and solicit additional information before resolving a current issue.



Record Detail
Use the arrow button to proceed to the record details. Each record in the portal will have its own button.

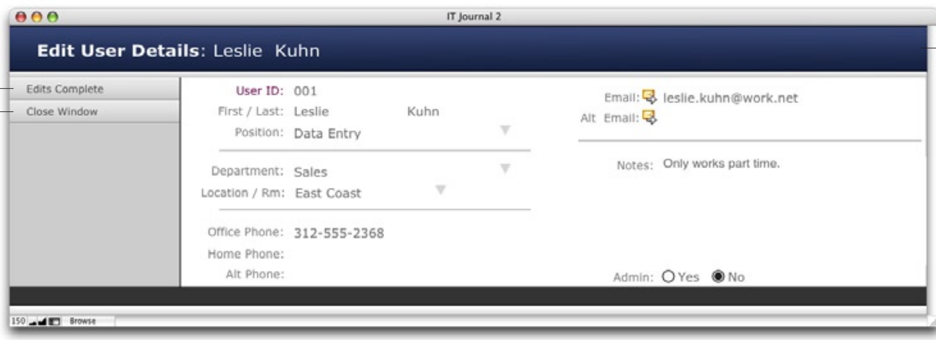
History Portal
This will display the request, with the most recent request located at the top. If there are more than 18 records, use the scroll bar to view additional tickets.

User Information
The ticket history will show only tickets related to the User ID of the record being viewed.

Tickets: Working with Users

As previously mentioned, the user information in the Tickets table is not based on a simple relationship. It uses the relationship to Look-Up data between tables and stores the information within the tickets table each time a ticket has an assigned User ID. This way if someone leaves the company, when their information is removed from the Users Table, tickets previously assigned to them will still have accurate user information. This being the case, changing or adding user information must be handled differently in the Tickets table. Two pop-up windows have been created to add a new user or to edit an existing user's record. Using the appropriate choice will keep your data accurate.

Edit User
When editing User Information, you are editing the information related to the User ID.

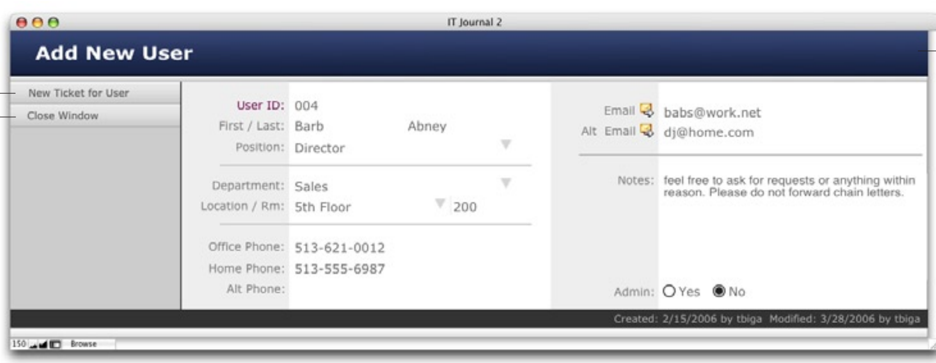


Edits Complete
Saves changes made to the user's Information.

Close Window
If you want to leave the record unchanged, click Close Window.

Window Title
The window title lets you know if you are editing an existing user or creating a new one.

Adding Users
When adding a User, a new User ID will be created. The creaton of a user record can not be cancelled from this window. If the creation of the user needs to be undone, do so from the Main User layout.



New Ticket
Once the user has been added you can immediately create a help desk ticket.

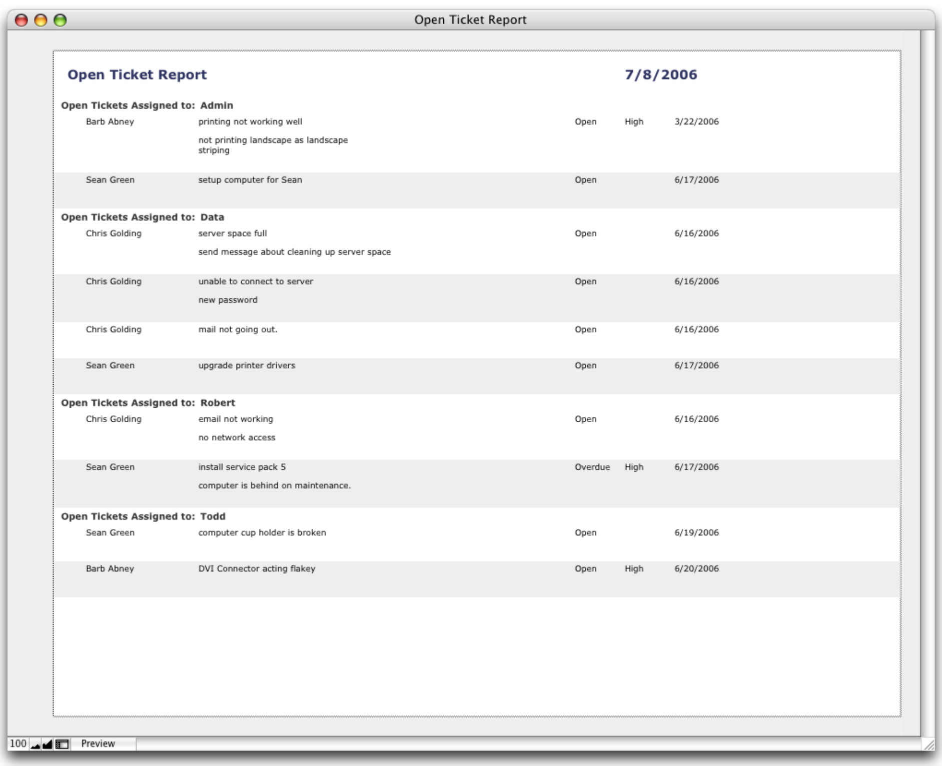
Close Window
If a new ticket is not needed, closing the window will return you to the last viewed record in Ticket Details.

Ticket Reports

IT Journal Pro includes buttons for two useful reports. The first is a report showing all open tickets assigned to all technicians. The second is a report showing the number of hours a technician has worked on the issue. Both reports are designed to be printed.

Open Ticket Report

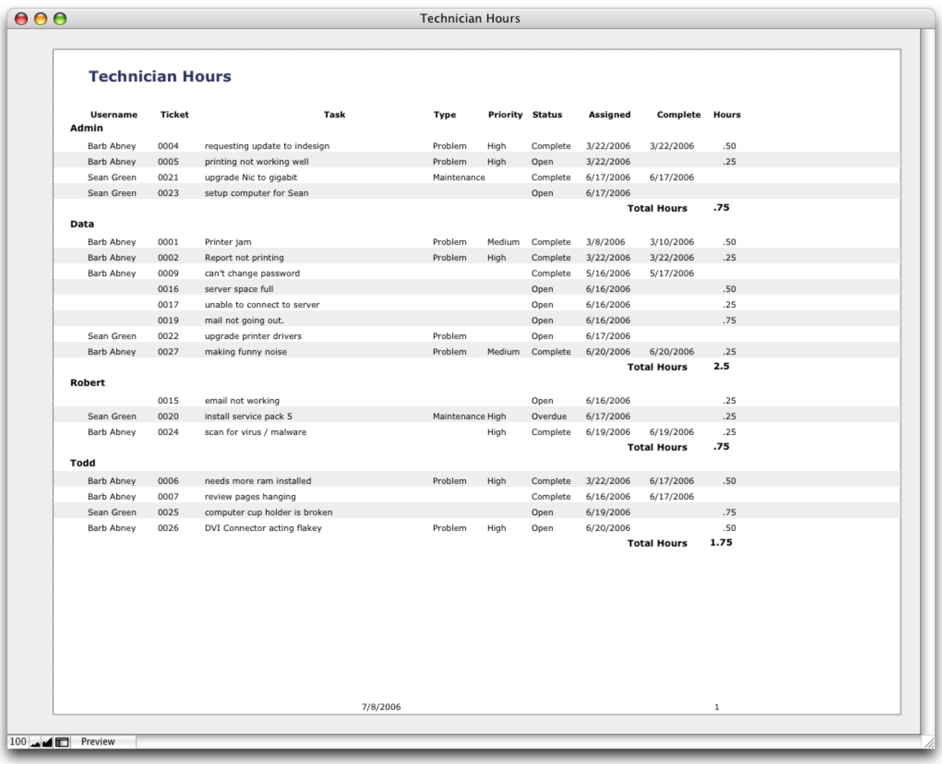
When you run this report from the main Tickets layout everything is generated automatically. If a tickets status is set to Open (any other status setting and the record won't be in the report) a report is displayed in preview mode showing all open tickets. The tickets are divided and sorted by the assigned Technician. Details such as the name of the user making the request, the ticket's title, ticket details, priority, and date assigned to the technician are also shown.



Ticket Reports continued...

Technician Hours Report

When you run this report from the main Tickets layout you will first be presented with a pop-up window where you will specify a start date and end date. Once the dates are entered, press Find Records and the report will display all tickets that have been created or modified between the dates specified. The report sorts the ticket by technician showing the user who made the request, ticket number, ticket title, type of ticket, priority, status, the date assigned, a completion date (if the ticket is completed) and the amount of time it took the technician to resolve the issue. The time is then tallied and displayed below each technician's section.


Technician Hours

Technician Hours

Username	Ticket	Task	Type	Priority	Status	Assigned	Complete	Hours
Admin								
Barb Abney	0004	requesting update to indesign	Problem	High	Complete	3/22/2006	3/22/2006	.50
Barb Abney	0005	printing not working well	Problem	High	Open	3/22/2006		.25
Sean Green	0021	upgrade Nic to gigabit	Maintenance		Complete	6/17/2006	6/17/2006	
Sean Green	0023	setup computer for Sean			Open	6/17/2006		
							Total Hours	.75
Data								
Barb Abney	0001	Printer jam	Problem	Medium	Complete	3/8/2006	3/10/2006	.50
Barb Abney	0002	Report not printing	Problem	High	Complete	3/22/2006	3/22/2006	.25
Barb Abney	0009	can't change password			Complete	5/16/2006	5/17/2006	
	0016	server space full			Open	6/16/2006		.50
	0017	unable to connect to server			Open	6/16/2006		.25
	0019	mail not going out.			Open	6/16/2006		.75
Sean Green	0022	upgrade printer drivers	Problem		Open	6/17/2006		
Barb Abney	0027	making funny noise	Problem	Medium	Complete	6/20/2006	6/20/2006	.25
							Total Hours	2.5
Robert								
	0015	email not working			Open	6/16/2006		.25
Sean Green	0020	install service pack 5	Maintenance	High	Overdue	6/17/2006		.25
Barb Abney	0024	scan for virus / malware		High	Complete	6/19/2006	6/19/2006	.25
							Total Hours	.75
Todd								
Barb Abney	0006	needs more ram installed	Problem	High	Complete	3/22/2006	6/17/2006	.50
Barb Abney	0007	review pages hanging			Complete	6/16/2006	6/17/2006	
Sean Green	0025	computer cup holder is broken			Open	6/19/2006		.75
Barb Abney	0026	DVI Connector acting flakey	Problem	High	Open	6/20/2006		.50
							Total Hours	1.75

7/8/2006 1

100 Preview

Software

Details

Keeping track of software investments has become a critical task assigned to IT departments. With the cost of software going up year after year and license agreements becoming more complicated, accurate and detailed purchasing records can help save your company money.

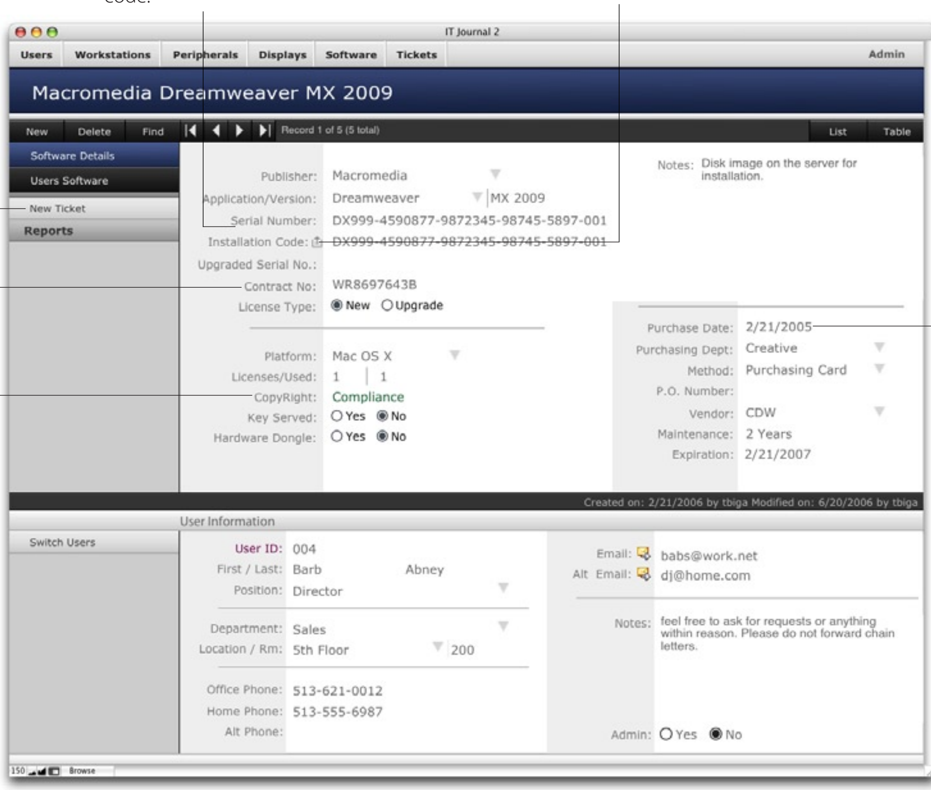
Serial Number & Installation Code
Occasionally software has a different serial number from the installation code.

Matching Codes
If the install code and serial number match, press this button to quickly enter the number a second time.

New Ticket
Create a ticket related to software records.

Contract Number
Used in some cases of volume purchasing.

Software Compliance
IT Journal will evaluate the Installation code of each software record to determine how many times it has been used. It will display that number in the 'Used field' and a Copyright status of Compliance or Violation will be displayed.



Purchasing
Track details regarding the purchase of software.

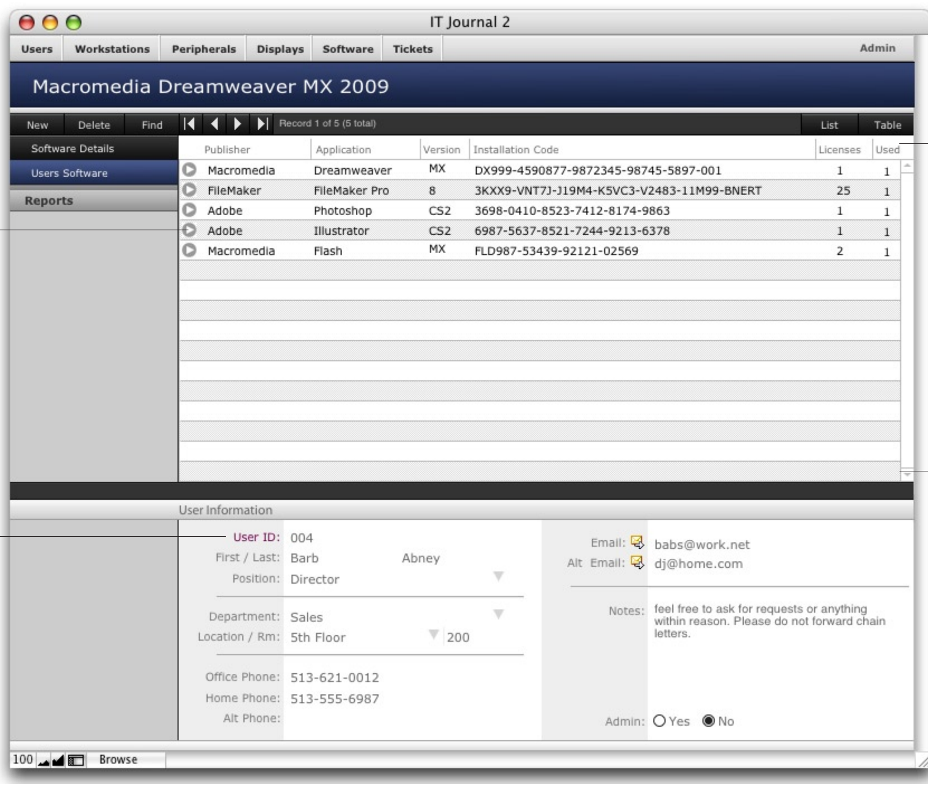
Software is assigned to a user when a record is assigned a User ID. It is recommended that you create a record for every copy a software license gives you the rights to install. The field for Upgrade Serial Number has been provided to assist in keeping track of software that has been upgraded and may get a new serial number but not a new installation code.

Consider creating a User ID to hold software that is not assigned to anyone. This way you can have a list of available software to pull from if the need arises.

Software continued...

Users Software

In the Users Software layout you can easily see all the software assigned to a specific user. This can be especially useful if you are preparing a new computer for the user and want to get it ready ahead of time.



Record Detail
Use the arrow button to go to the record details. Each record in the portal will have its own button.

User ID
Users software will show only applications related to the User ID of the record being viewed.

Software Portal
This will display the software assigned to a specific person.

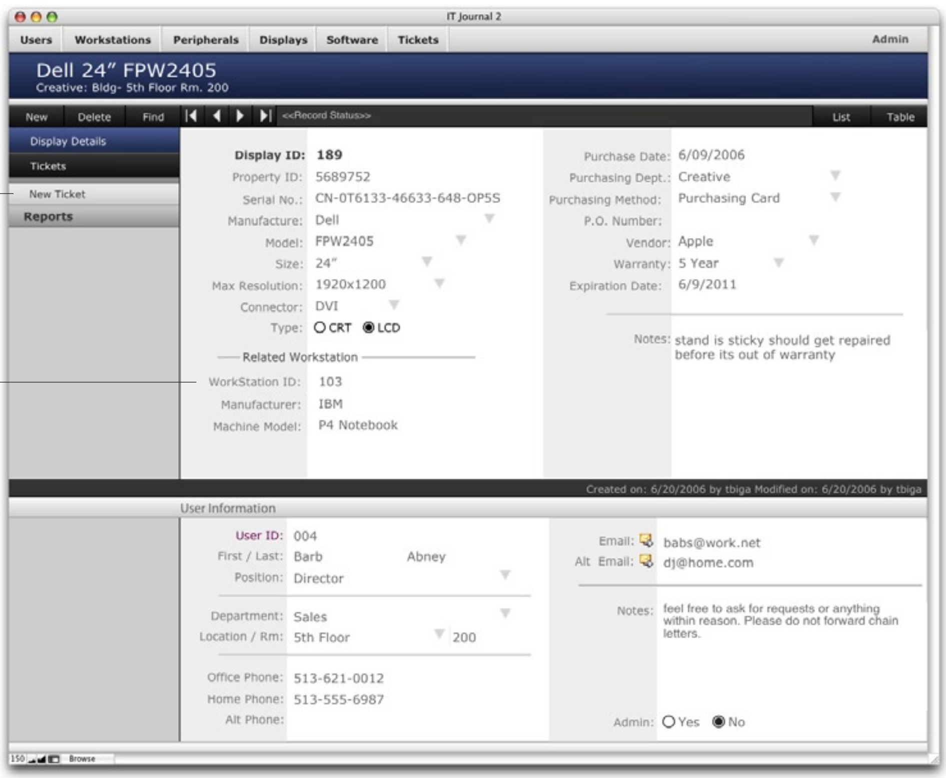
Displays

Details

It is easy to track inventory and purchasing information about Displays. With the cost of LCD displays still high, it is important to keep track of them, especially when an extended warranty has been purchased.

New Ticket
Create a ticket related to this device and user.

Workstation ID
Enter a workstation number to know to which computer the display is attached.



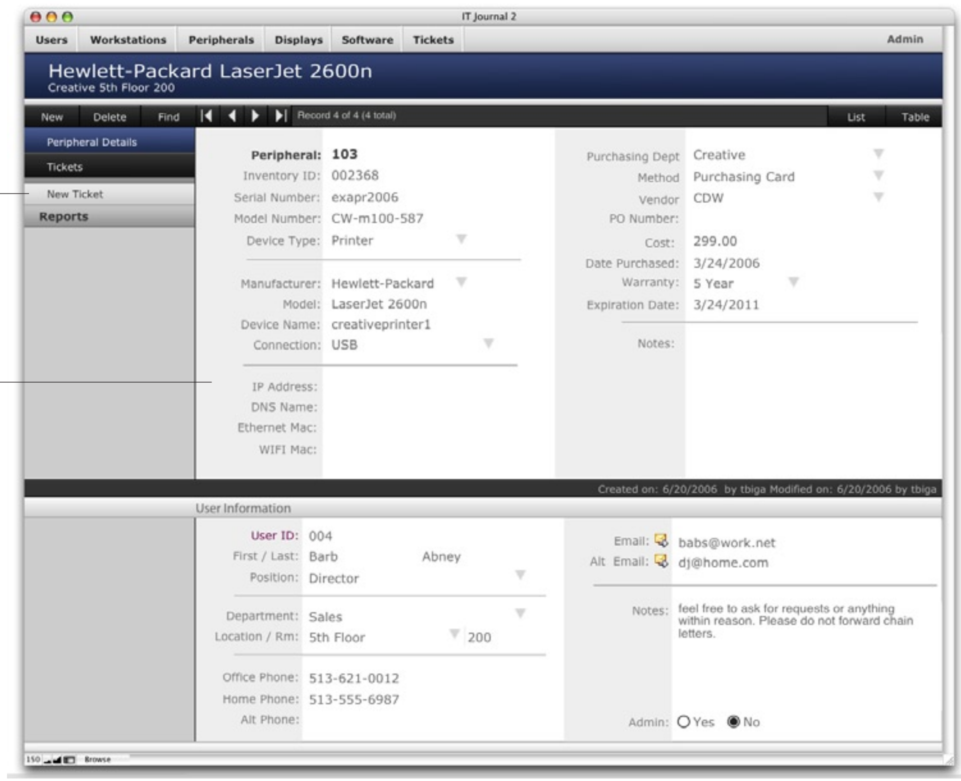
Peripherals

Details

Inventory and keep purchasing information on a wide variety of devices in the Peripherals table. Track scanner, printer, external drive, network devices or anything else needed.

New Ticket
Create a ticket related to this device and user.

Network Information
If the device is connected to your network keep track of those details here.



Consider adding a generic user(s) to your database to assign shared network devices such as printers, switches, and wireless base stations. If there are multiple location or departments within your company base the username on one of these. An example would be a User ID for "Creative 23rd Floor" or "Theater Department." This will assist in assigning and tracking trouble tickets that will need to be created for these devices.

Admin

Details

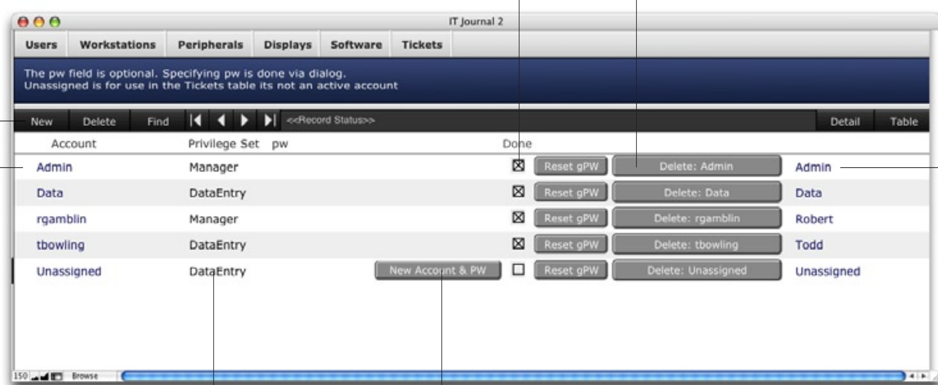
New to IT Journal Pro 2 the Admin section allows the IT manager to setup and maintain technician accounts within the solution. This feature has greatly enhanced the ability to track work and generate reports about help desk activity.

New Record
Creates a new record in this layout.

Done
Shows an account has been created and is active.

Delete
Removes the account from the database.

Account Name
Name used to login to the database.



Display Name
The name that will be used elsewhere in the database.

Privilege Set
Sets account limitations.

New Account & Password
Triggers a script to create the account.

Setting Up User Accounts

1. Create new record
2. Assign an account name
3. Assign privilege set
4. Enter display name
5. Press New Account & PW button
6. Dialog appears for password; enter password