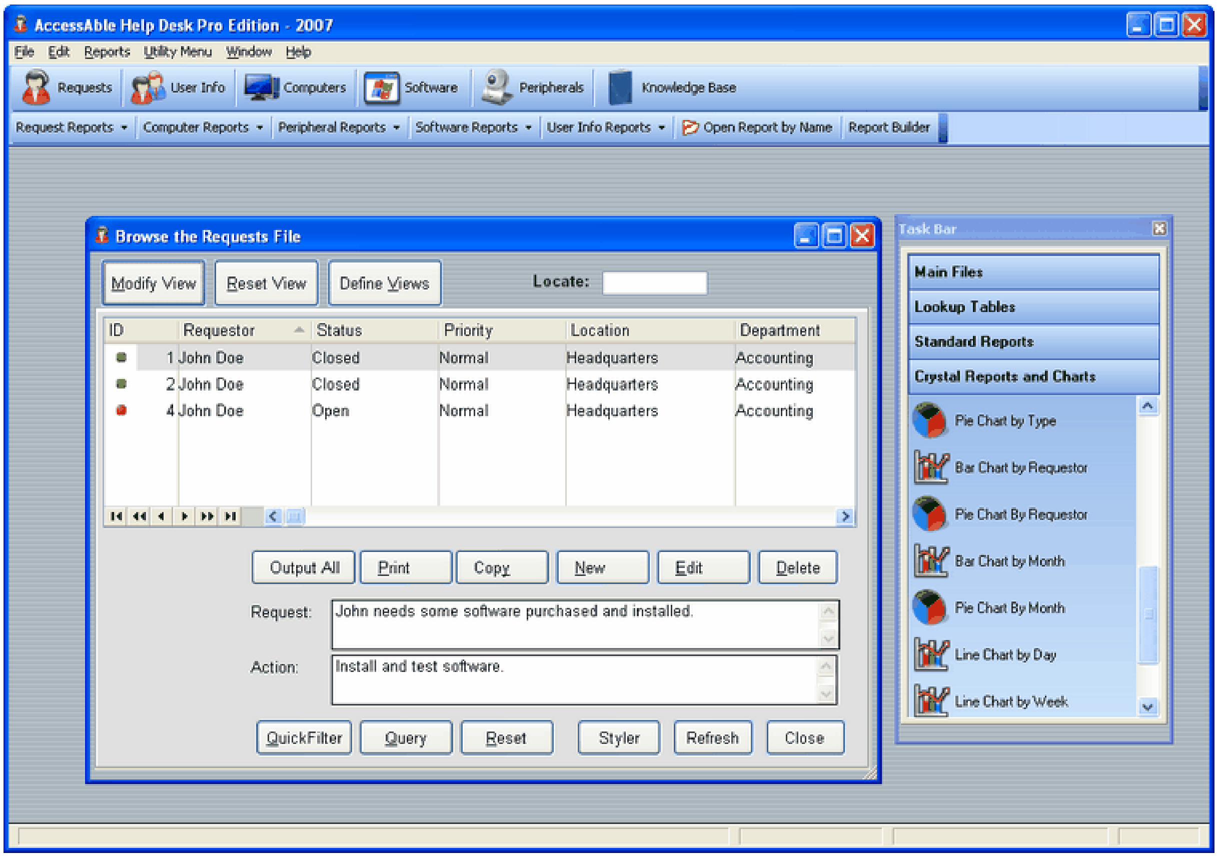
Table of Contents

1 AccessAble Help Desk Pro 2007 Windows Application

1.1 Introduction

This is version 2007 of AccessAble Help Desk Pro Edition - released in January 2007.

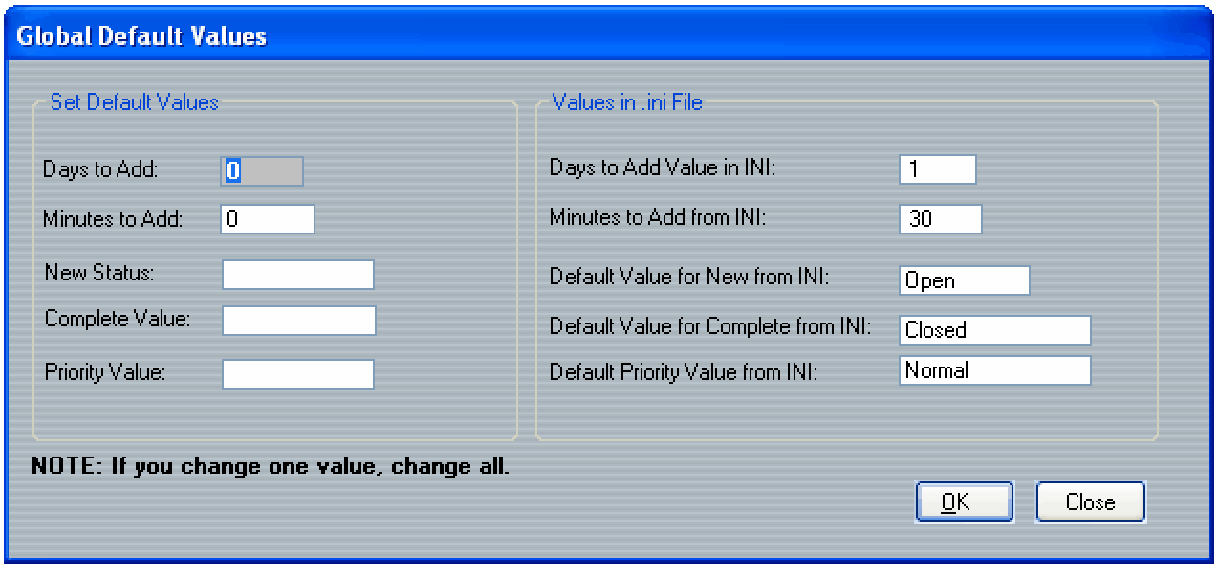


The push button menu included in earlier versions has been replaced. I now include a dock able Task Bar, available on the utility menu. Query Drop down lists on browse screens have been replaced with Query and Reset buttons. The new Quick Filter button is for those times when you don't need to save a search or to query on multiple fields. It just allows you to select a single field and search for records equal to a single value. A Locate box has been added to some of the browse screens. This will allow you to type the first few characters of the column you are sorted on and when you press TAB or ENTER the cursor will zoom to the first matching characters.

Many changes have been made to the database structure and to the design of the windows application. These changes are noted throughout this help file.

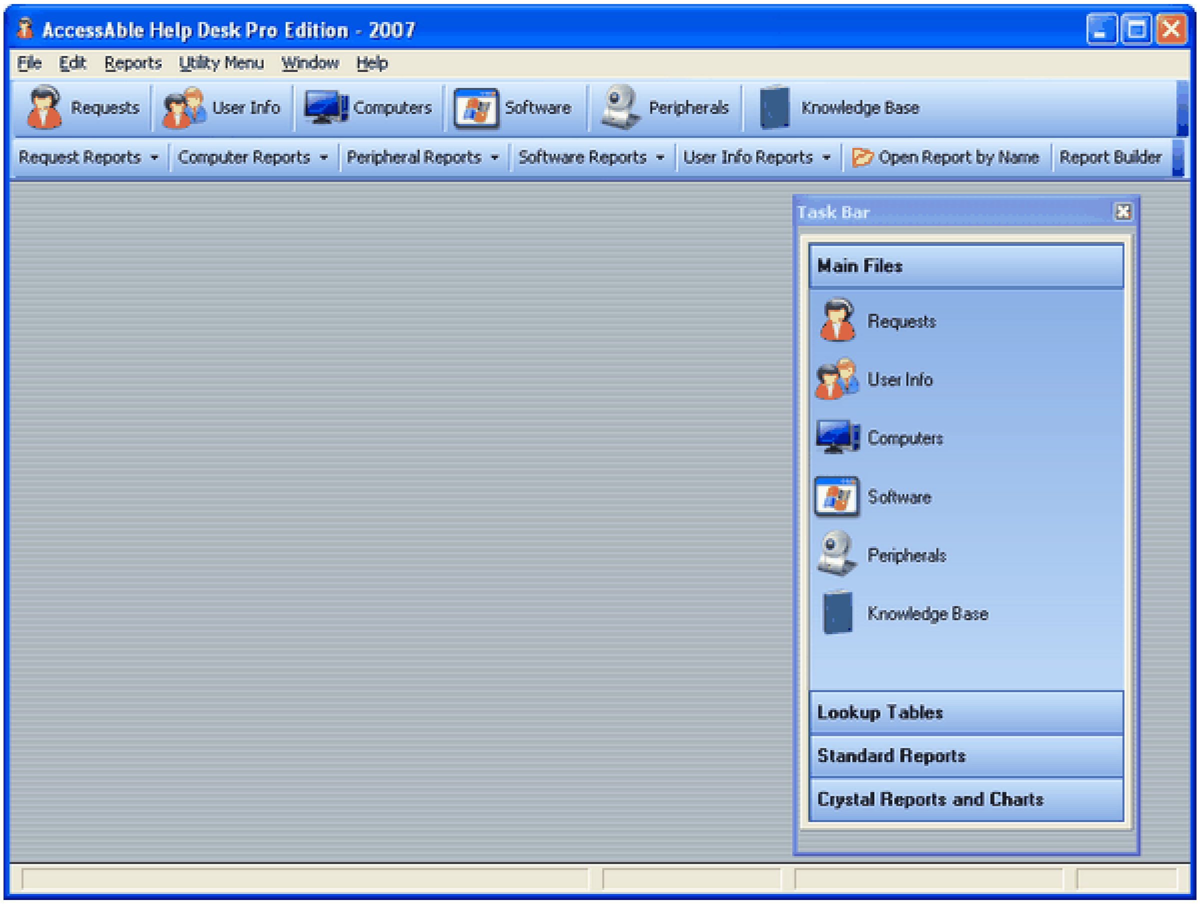
One change in version 2007 that many may find useful is the Default Values screen.

On the right hand side of the screen are default values (read from an .ini file). You may enter new values on the left side of the screen. The first options are for the days to add to the current date and the minutes to add to the current time used for setting default Due Date and Due Time. You may enter a value to be used by default when adding a new request, and a default value to use when marking a request as complete. You may also enter a default Priority such as Normal for new requests.

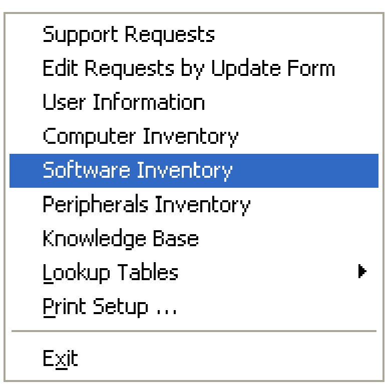


1.2 Main Menu

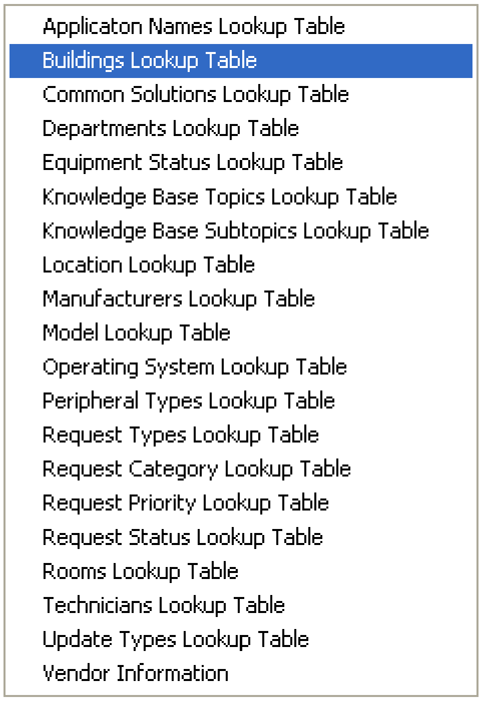
This is the main menu for AAHD Pro Edition 2007. This is a little different than 2.59. Standard drop down menus are available while a set of tool bar buttons allow quick access to the main files. Drop down buttons on a second tool bar allow you to easily select a report, open a Crystal Report by browsing for the file, and a button to access the Report Builder.



Starting at the far left are drop down menus beginning with the File menu. This is a good place to start. The menu options here begin with the main files, the files you will be using most often,



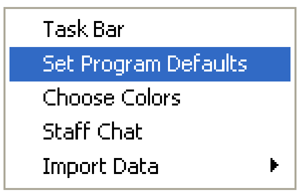
followed by the lookup tables. In order to speed data entry, lookup tables are used at many places in the program. Selecting a value from a drop down list is much quicker than typing a frequently used value over and over again. Also when some selections are made from a drop down list, other values are "looked up" and filled in from the lookup tables.



After the File Menu is the normal Edit menu, followed the Reports drop down menu. Now, there are two kinds of reports. The standard reports are compiled into the application and can be filtered using the Query Wizard.

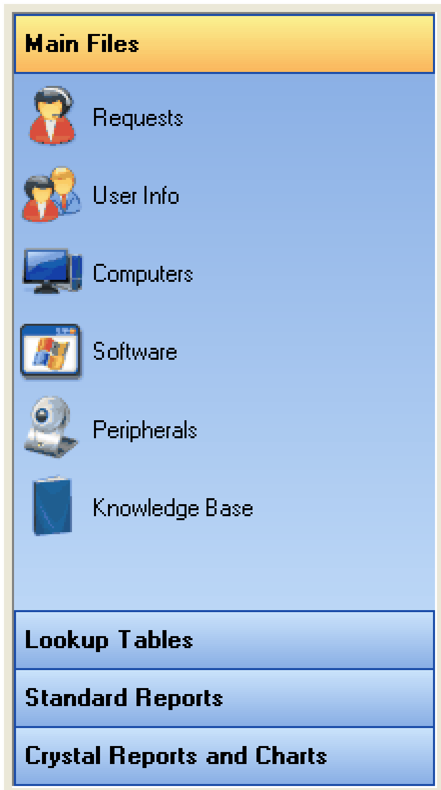
For those that use Microsoft's Excel there are also spreadsheet wizards which let you define, and query, layouts which will then export the data to an Excel Spreadsheet. I include with the Standard reports Custom Report Wizards which let you create simple list style reports. T. The other kind of reports are provided in Crystal Reports 9.0 format and the install will include the runtime files required to print and export these reports. These CR Reports cannot be filtered using the Query Wizard. However, if you have a full version of Crystal Reports you can modify these reports, or create your own reports using the AAPRO2007 DSN. I have included a menu option to let you browse to a file location from within the program so you can run any of your own created reports.

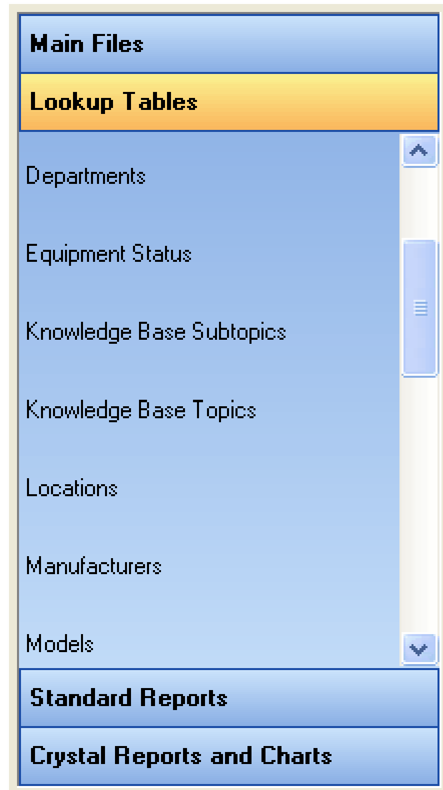
After the Reports drop down menu is a Utilities menu option. This menu will let you select a Color Scheme, (New in version 2007_ Set some Default Value, New in version 2.59 is a Staff Chat option. This would let you chat with other support personnel who have the Chat window open, and also new in version 2007 - activate the Task Bar.

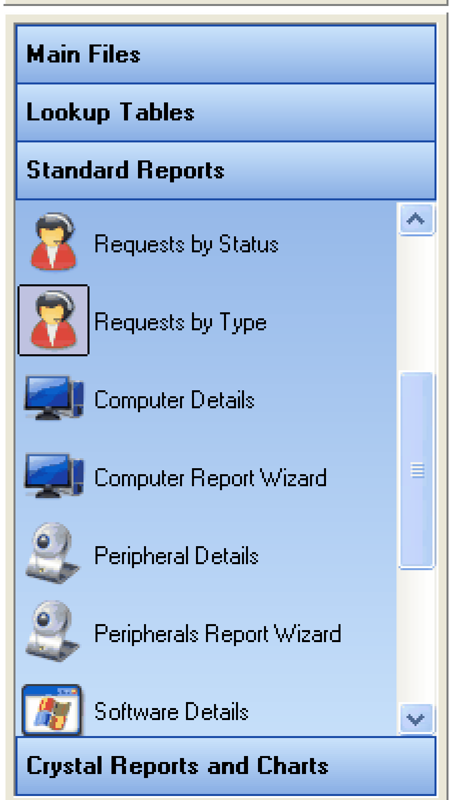


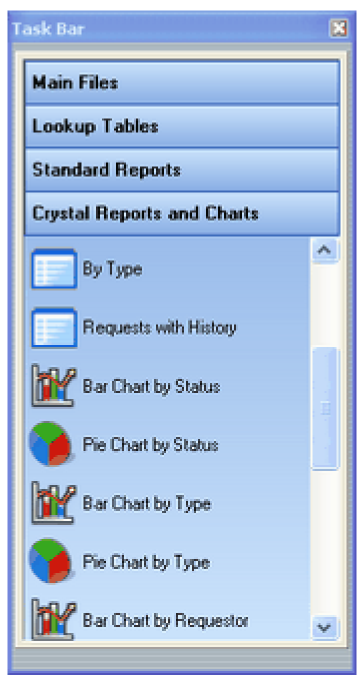
Next are drop down menus for the Windows you have open, and the Help menu options.

This version includes a Task Bar, a button style menu that can be docked (the default) or "float".


Main Files
Requests
User Info
Computers
Software
Peripherals
Knowledge Base
Lookup Tables
Standard Reports
Crystal Reports and Charts


Main Files
Lookup Tables
Departments
Equipment Status
Knowledge Base Subtopics
Knowledge Base Topics
Locations
Manufacturers
Models
Standard Reports
Crystal Reports and Charts


Main Files
Lookup Tables
Standard Reports
Requests by Status
Requests by Type
Computer Details
Computer Report Wizard
Peripheral Details
Peripherals Report Wizard
Software Details
Crystal Reports and Charts


Task Bar
Main Files
Lookup Tables
Standard Reports
Crystal Reports and Charts
By Type
Requests with History
Bar Chart by Status
Pie Chart by Status
Bar Chart by Type
Pie Chart by Type
Bar Chart by Requestor

1.3 Installation Notes

Installation Notes

The default installation should be accepted in most cases. However, if you have the full version of Crystal Reports installed, you might want to choose the custom installation and deselect the runtime files. Also, if the computer you are installing the program on will NOT be also serving the web pages, you might want to de-select the web pages installation.

When multiple technicians will be using the program in shared mode, it will be necessary for them to move one of the aapro2007.mdb files to a location on a common server. Then, using the ODBC Applet in control panel, they will each need to modify the DSN AAPRO2007 to point to the location of the shared database - aapro2007.mdb

The default installation will place the database file in c:\inetpub\wwwroot\aahdpro2

While the windows application and the Crystal Reports use the ODBC DSN to connect to the database, the web interface uses a DSN-Less connection as specified in the common.asp file - please see the section on the web interface for more information on setting up and using the web pages. While you can use any HTML editor to modify the .html pages, I recommend using only Notepad.exe to edit the .asp pages. You will need at least to make some changes to the common.asp file - especially if the database is not going to be in the expected directory - c:\ineptub\wwwroot\aahdpro2

Because I can't know the IP address of host name of your web server, I have the server url as localhost. So, open the file common.asp and look for the line below. Replace localhost with your server ip address, or maybe domain name:

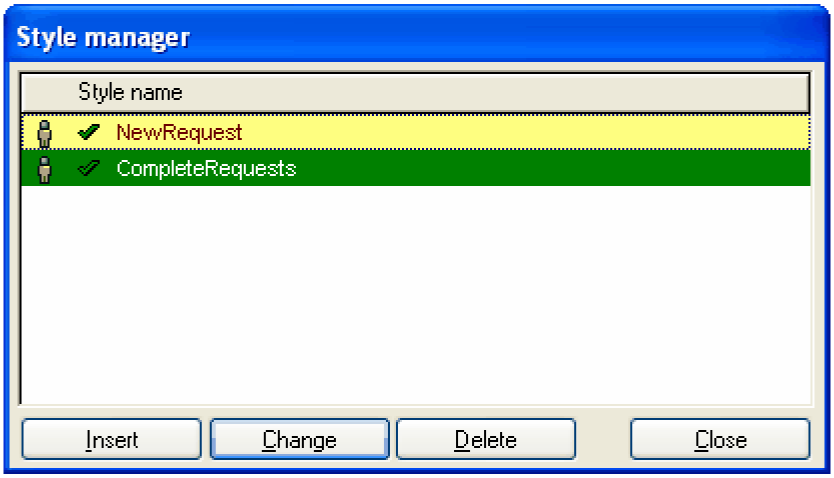
ServerURL = "http://localhost/.."

The database connection is also set in the common.asp file, so look for and modify if needed the lines below in the common.asp file:

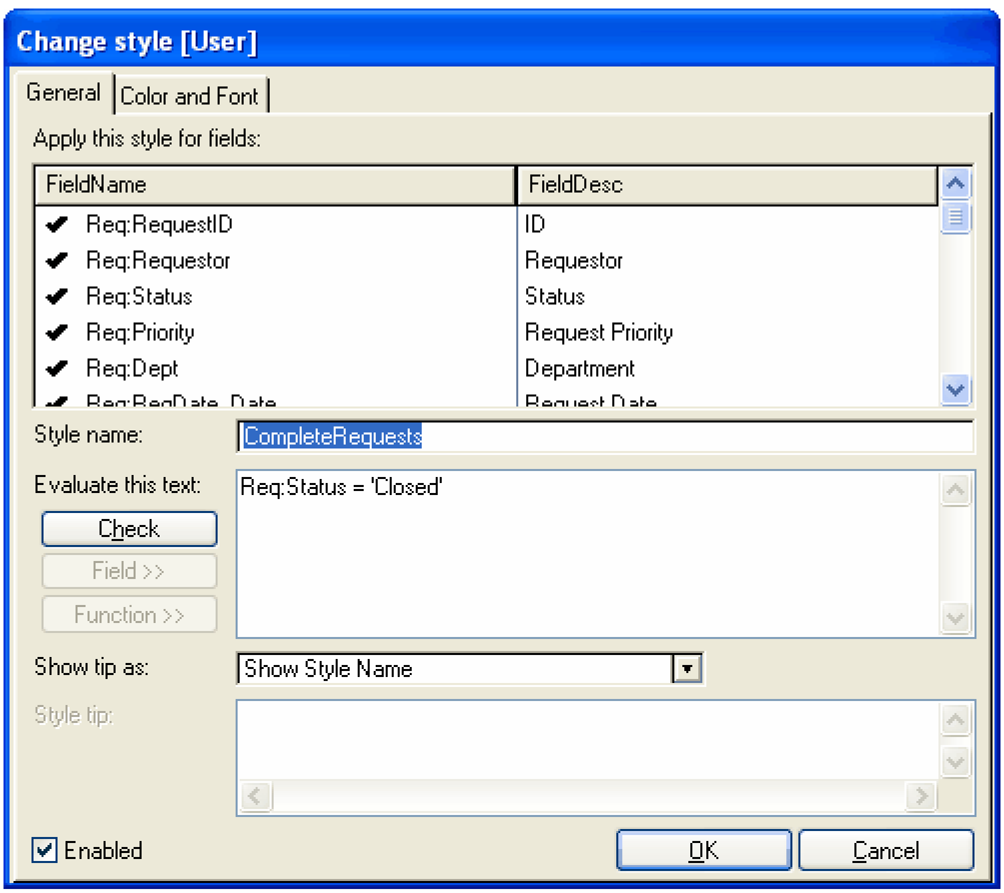
ConnectionString = "Provider=Microsoft.Jet.OLEDB.4.0;User ID=Admin;Data Source=C:\Inetpub\wwwroot\aahdpro2\aapro2007.mdb;Persist Security Info=False"
User = "Admin"
Password = ""

1.4 Style Manager

The style manager will let you emphasize problems with conditions you specify by changing the fonts and colors for either individual columns or all columns. You can access the Style Manager by clicking the Style Manager button or pressing the CTRL key and then the S key. You will first see a screen like the one below:



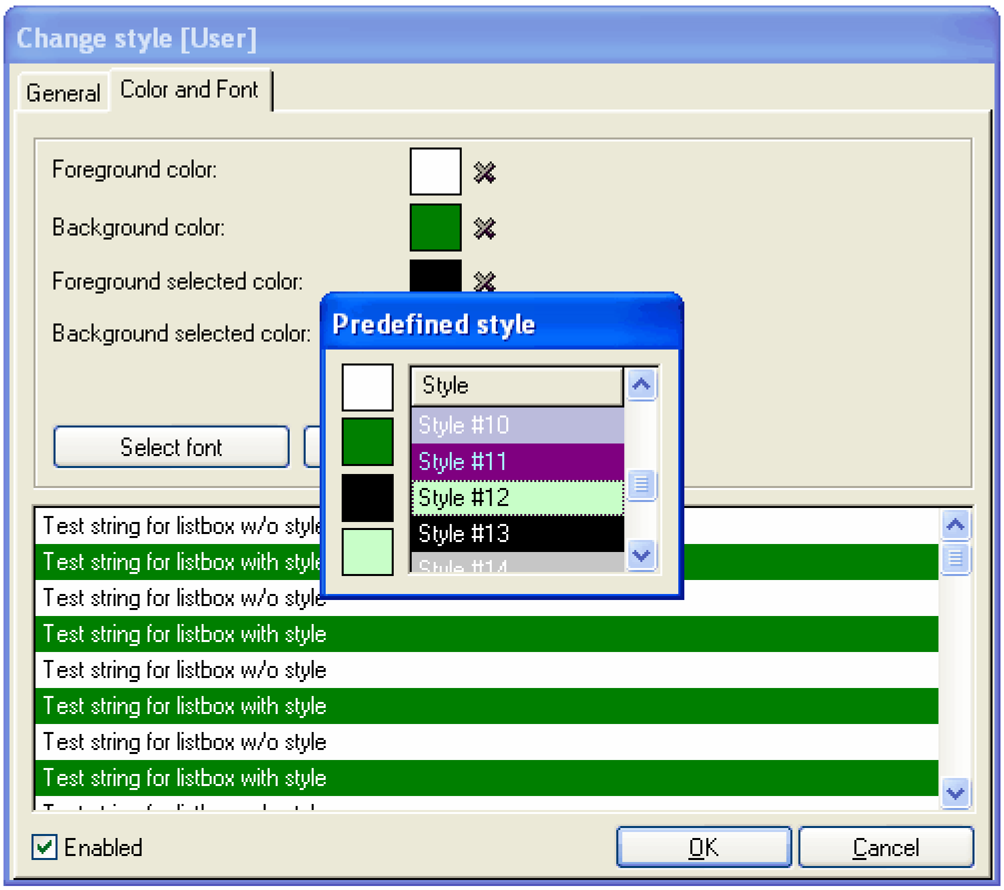
I have defined two styles as you see in this list. I have named one New and the other Complete Requests. Click the Change button on the style named Complete and you would see a screen like the one below.



There are two tabs on this screen. First you will notice I have a check mark by all fields. You can select individual fields (columns) by double clicking them or Right Click and choose Select all, as I

have done. Next enter a name for the Style.
In the Evaluate this text: box I have Req:Status = 'Closed'. Suppose you wanted to create a style for requests that are not New and are not Complete. You would enter the text: Req:Status <> 'New' and Req:Status <> 'Closed'. It is really not hard.
The next choice is to show the tool tip. You can choose None at all, the Style Name, the Expression Text (in the case above just the word 'Complete') or Custom Text (anything you want to type) or more useful maybe, is evaluate custom text. For example, if you want the tip to show part of the request details you could enter Req:Details as the Evaluate Custom Text.

The second tab is where you set up fonts and colors to emphasize the rows that match your text.



I recommend at first to use one of the predefined styles to highlight rows matching your condition.

1.5 Query Wizard

The Query Wizard provides a quick and easy way to filter data either for display on browse screens or to filter reports. Most browse screens now include a Quick Filter button. This is great for when you want to search a single field for a specific value. Just like when you have created a query using the Query option, the Reset button will remove the filter created by the Quick Filter button.

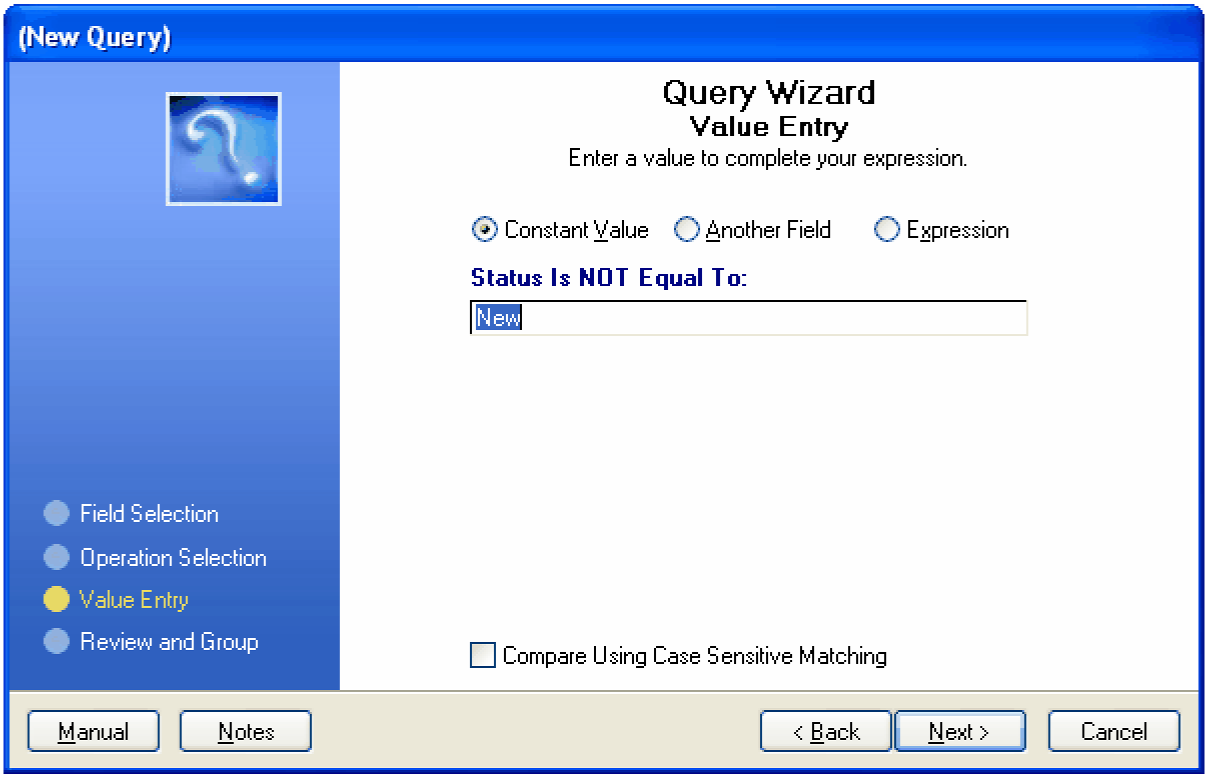
Let's go through the steps of creating a query.

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.

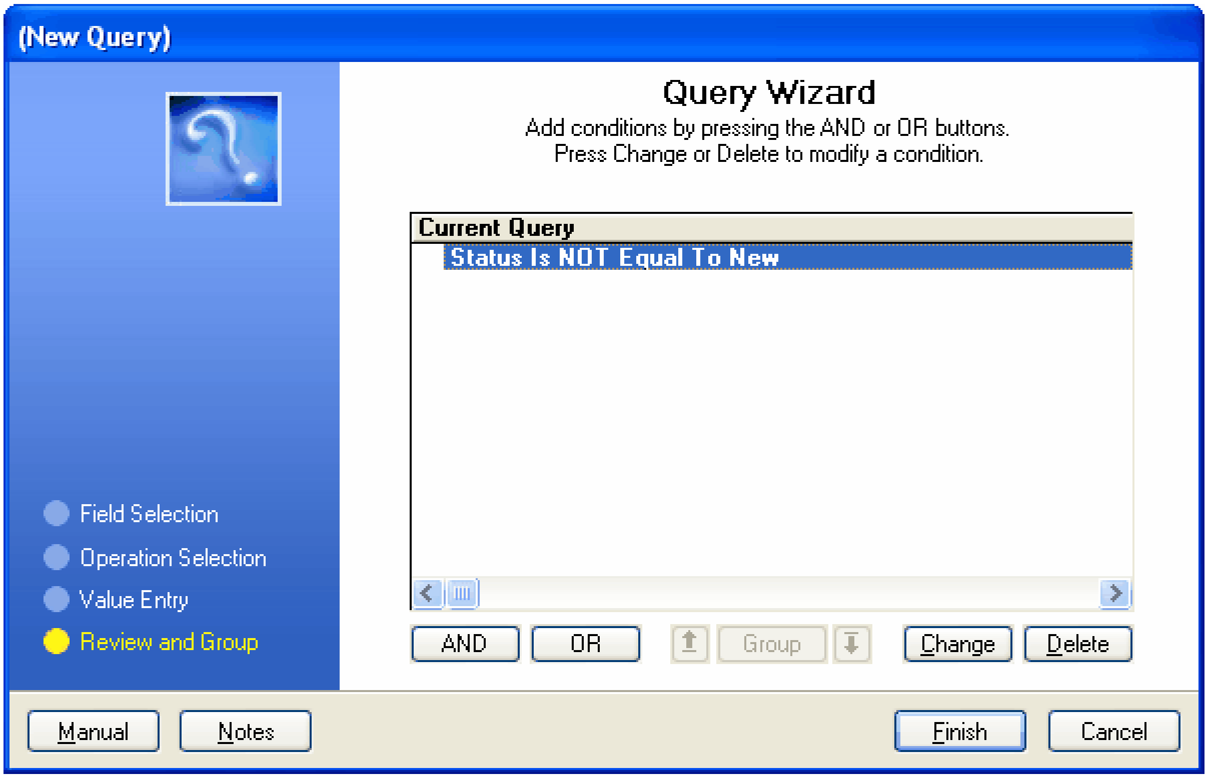
Next you will need to choose an operator to use. This version adds some new operators, such as the Between and Not Between. This is especially helpful for data searching. Also, new operators for the date type fields allow you to search for a month number (12- December, 11 - November and so on).

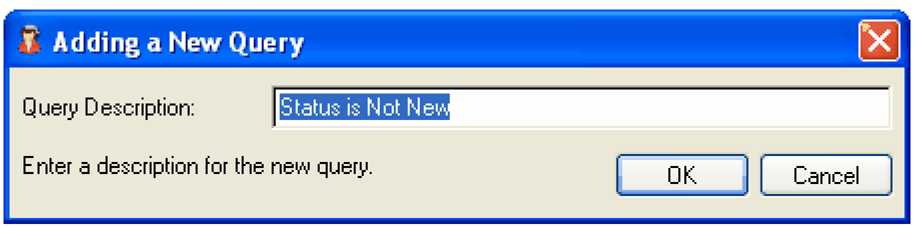
I will choose the Not Equal To operator.

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.



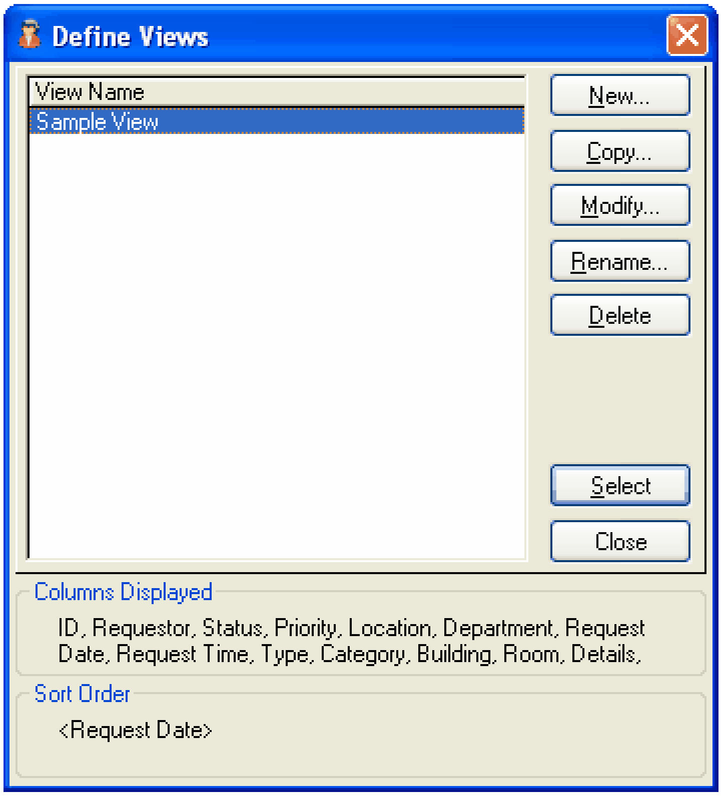
Finally, give you query a meaningful name. Click OK and the data is filtered as specified.



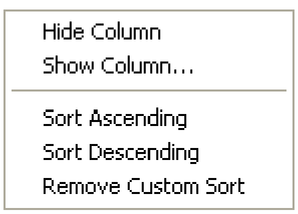


1.6 View Wizard

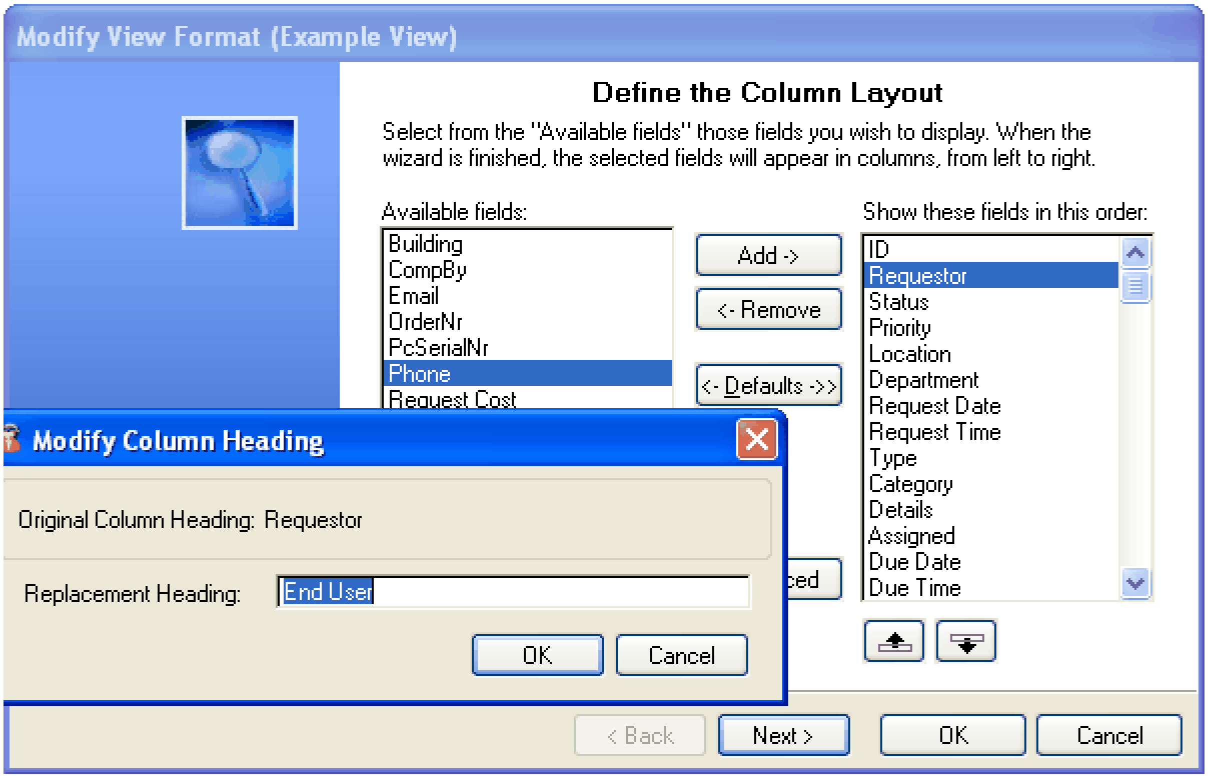
This version (2007) provides a View Wizard to allow you to customize browse screen displays. Buttons will allow you to Modify the View by choosing which fields to display and in which order. If you think you want to keep the view you are modifying don't forget to click the Save button, to Reset the View (restore the default browse setup if something goes wrong, or you like the default arrangement of rows), or to Define View. The Define Views option lets you Add or Delete views, copy a view to create one that is similar, and so on.

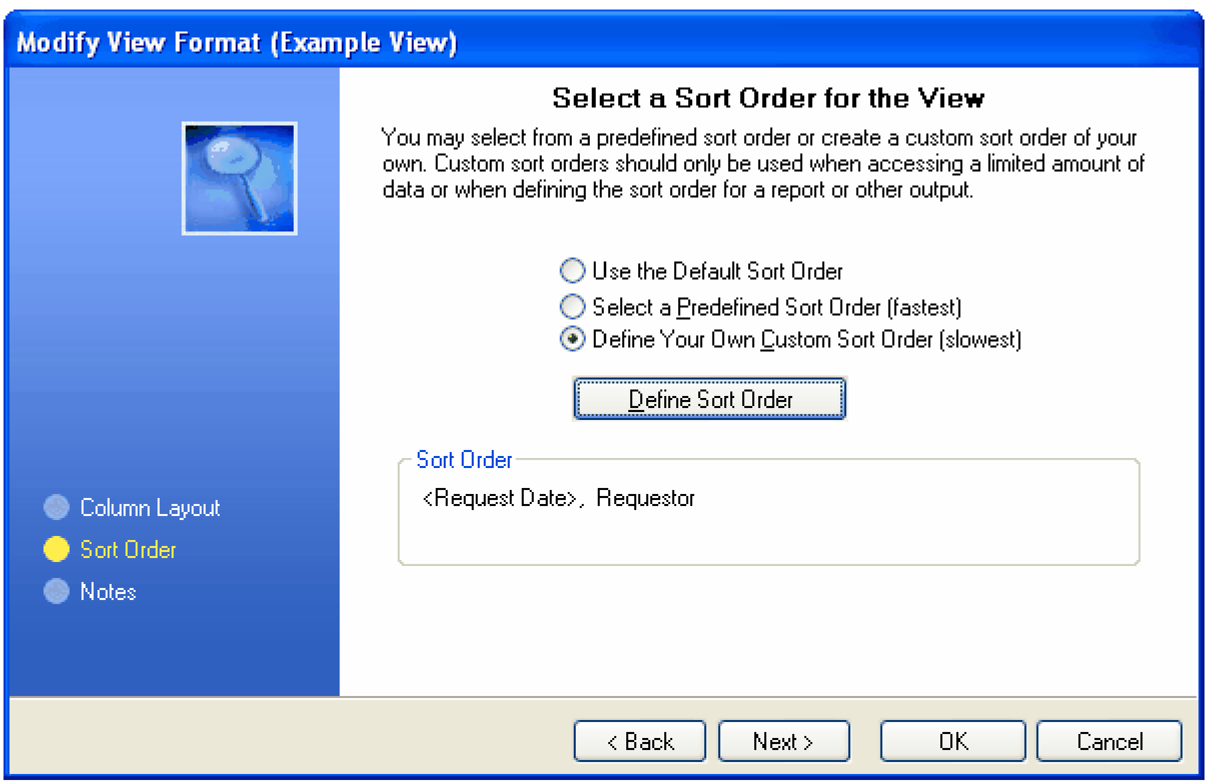


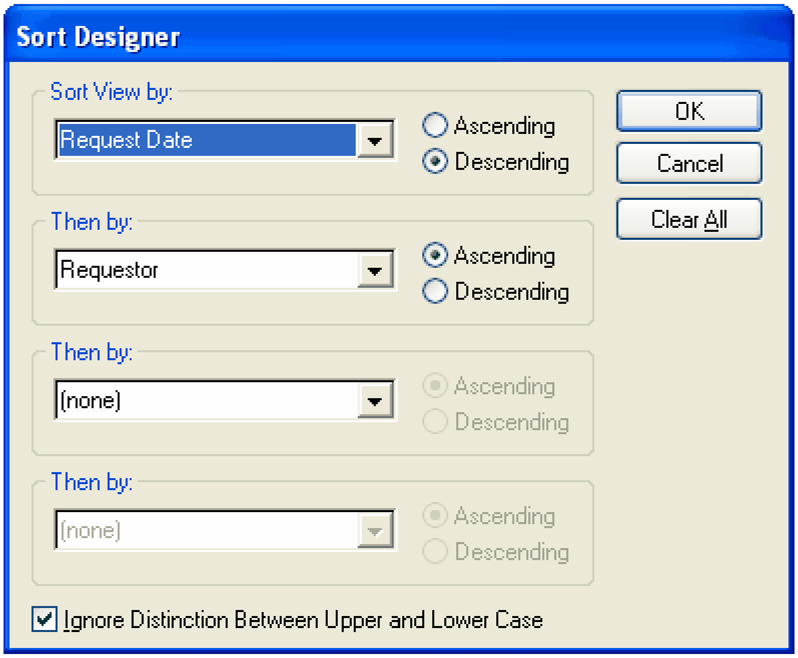
You can set sort orders by clicking on column heading, or right click on a column heading to get a pop up menu like below.

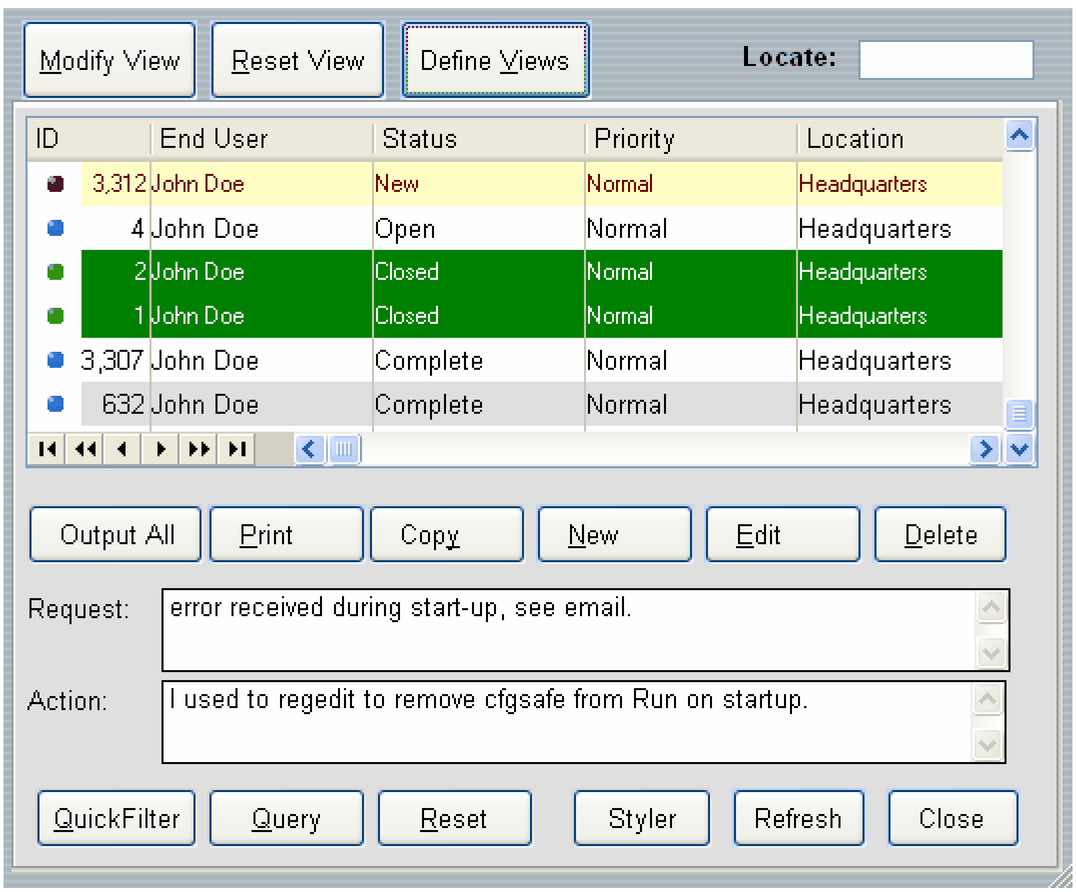


The screen shots below show the steps of using the View Wizard.


Modify View Format (Example View)
Define the Column Layout
Select from the "Available fields" those fields you wish to display. When the wizard is finished, the selected fields will appear in columns, from left to right.
Available fields:
Building
CompBy
Email
OrderNr
PcSerialNr
Phone
Request Cost
Add ->
<- Remove
<- Defaults ->>
Show these fields in this order:
ID
Requestor
Status
Priority
Location
Department
Request Date
Request Time
Type
Category
Details
Assigned
Due Date
Due Time
Modify Column Heading
Original Column Heading: Requestor
Replacement Heading:
End User
OK
Cancel
< Back
Next >
OK
Cancel


Modify View Format (Example View)
Select a Sort Order for the View
You may select from a predefined sort order or create a custom sort order of your own. Custom sort orders should only be used when accessing a limited amount of data or when defining the sort order for a report or other output.
Use the Default Sort Order
Select a Predefined Sort Order (fastest)
Define Your Own Custom Sort Order (slowest)
Define Sort Order
Sort Order
<Request Date>, Requestor
Column Layout
Sort Order
Notes
< Back
Next >
OK
Cancel





I hope many will find this View Wizard useful and an improvement on the list formatting options from earlier versions.

2 AccessAble Help Desk 2007 Web Interface

2.1 Web Interface

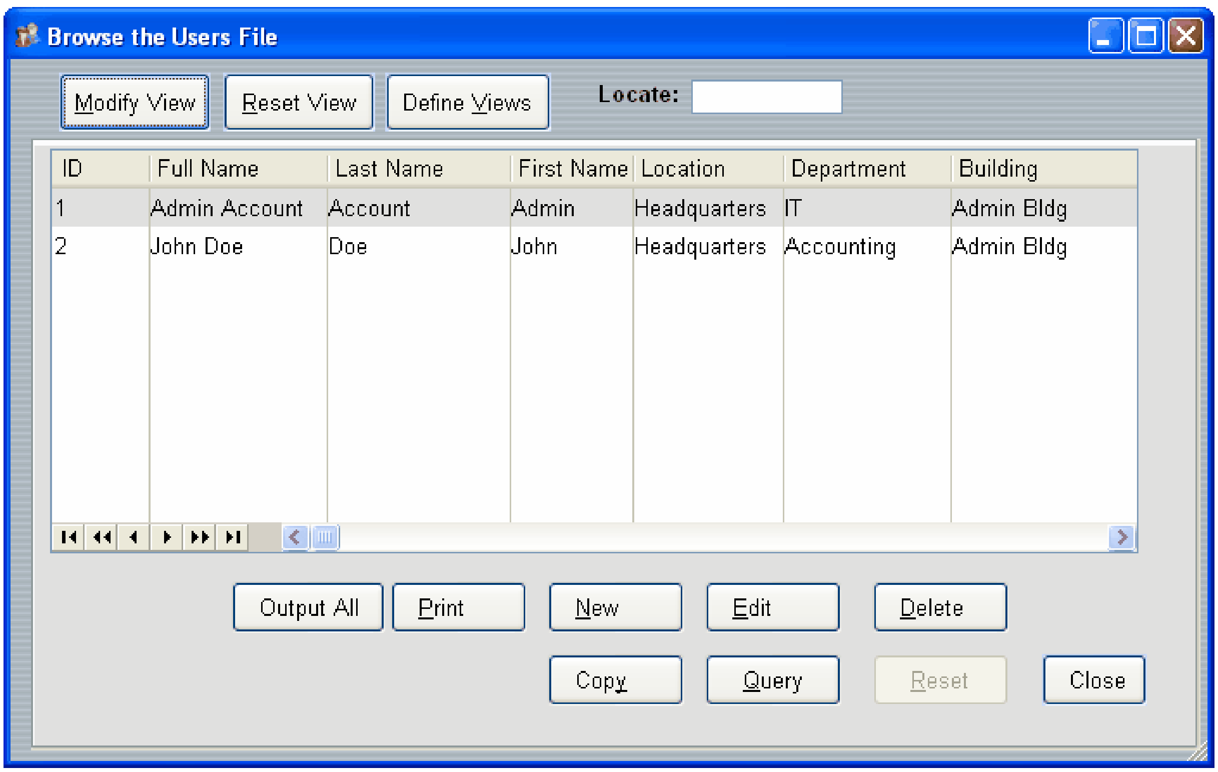
The Web Page interface is provided in a separate setup with a separate help file with the release of AccessAble Help Desk Pro Edition version 2007.

3 Main Files

3.1 Browse Users

Browse the Users File

This screen is used to view user information.   It shows User information in rows and columns like a spreadsheet.



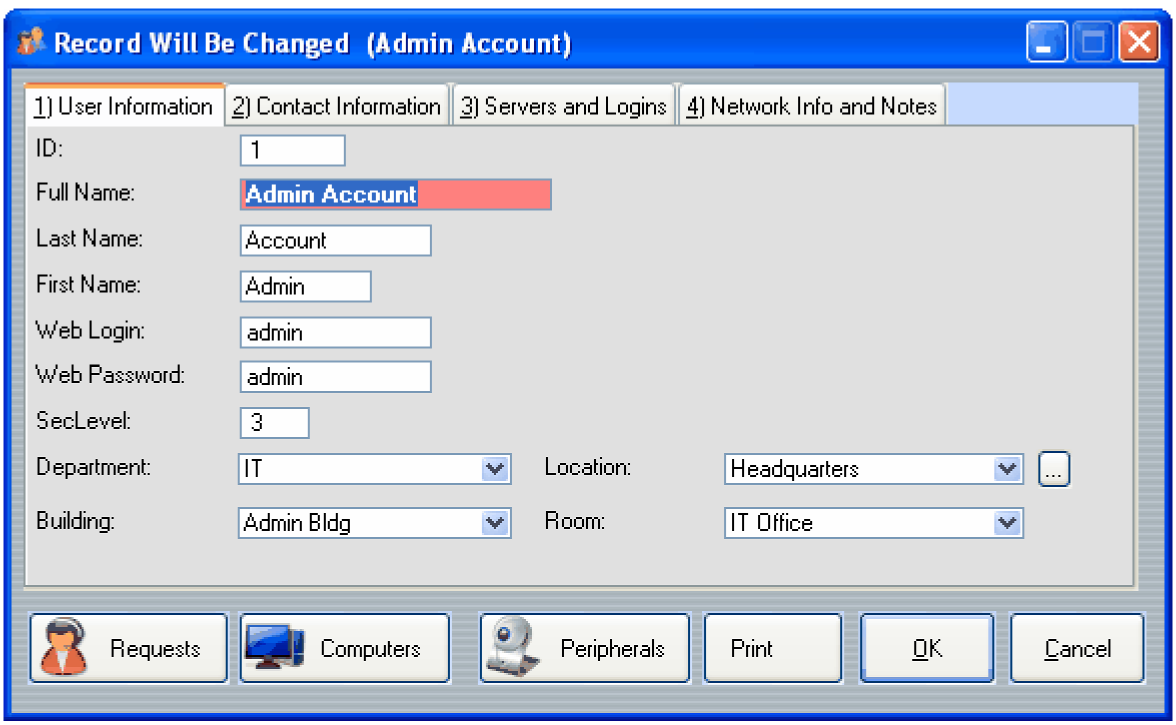
At the top of the screen is a locate box. This will allow you to enter the first few characters of the column you have sorted on and zoom to the first matching row. The Query button will allow you to use the Query Wizard to create more complex queries to filter the browse screen or to select a previously created query. The Reset button will remove any filter condition created with the Query button.

Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record. A Print button will let you preview a report of the currently selected record. The Output All button will launch Microsoft Excel (if you have it installed) with a spreadsheet containing all the records as displayed in the browse screen. A Copy button will allow you to create a duplicate of the selected record and then change any values to create a new user record based on the selected record.

3.2 Update Users

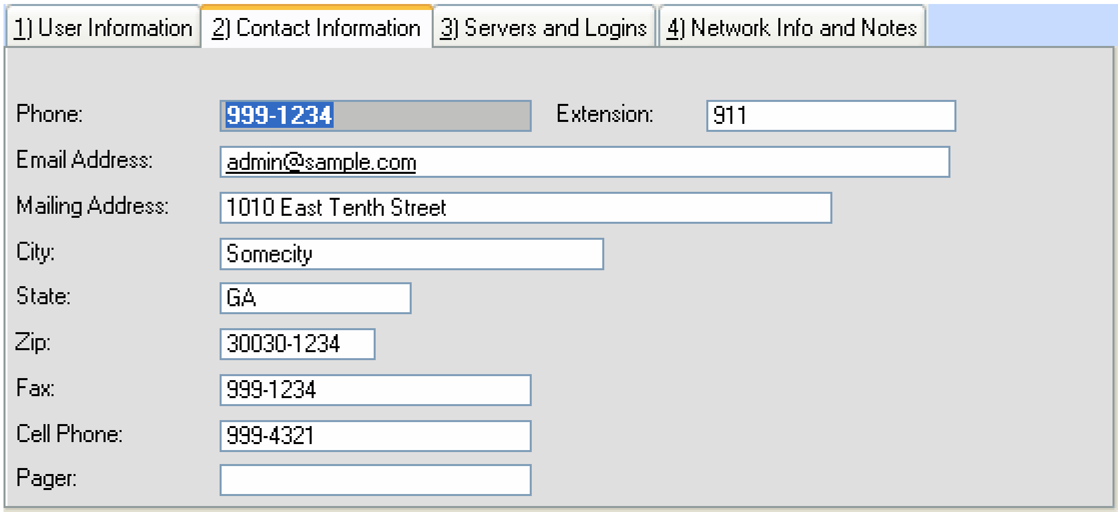
Update the Users File

This screen is used to add a new user record, or to change an existing record. A unique UID field will be incremented by 1 each time you add a new user record. The FullName field is used in many placed in the program to let you select the user from a drop down list. The Full Nam is a required field and you wont' be able to add a new record without some unique value in that field. Last Name (sur name) and First Name fields have been added in version 2007. Web Login and Web Password fields are important if you will be using the AAHD Pro Edition web interface to allow users to submit requests for support via browser and view their requests. A Security Level field defaults to 1 for a new user, and this is also used by the web page interface. If a user tries to access a web page that has a higher security level that defined here will be returned to the Login screen so they can login as user with the appropriate security level. The Department and Location fields can be quickly selected from the drop down list boxes. If you have not already set up the Lookup table for Department and Location, you can type a new value in the list box and it will be added to the lookup table. NOTE: If you are only using the single location field you can use the drop down list, but if you want to use Location information added in version 2007 (address, city, state, etc) then click the ... button and use that screen to select the location. If you use that option when adding a new user, the contact information for the location will be added to the user record you are adding.

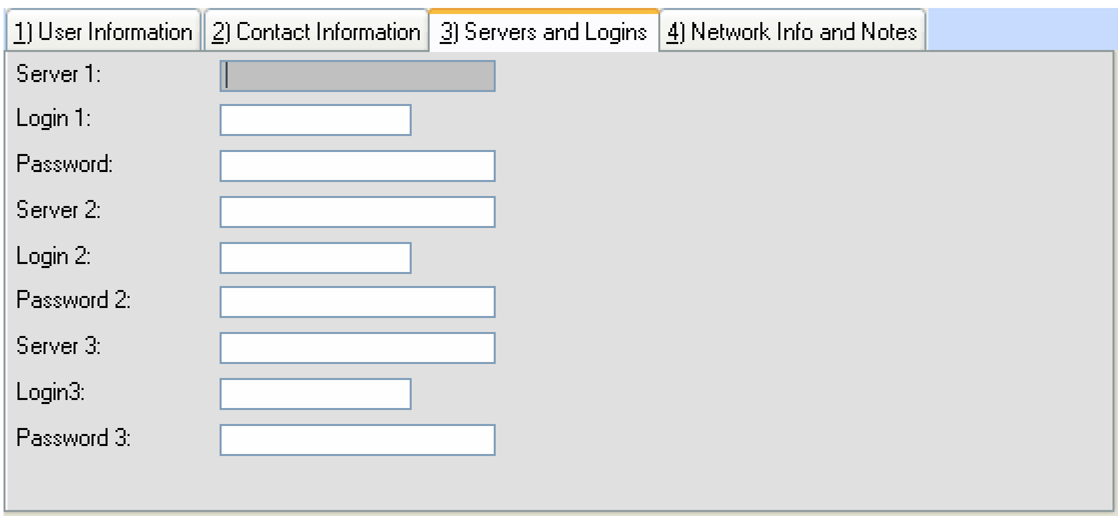


Buttons are provided on the first tab to allow you to quickly access related Requests, Computer(s) and Peripheral(s) for each user record.

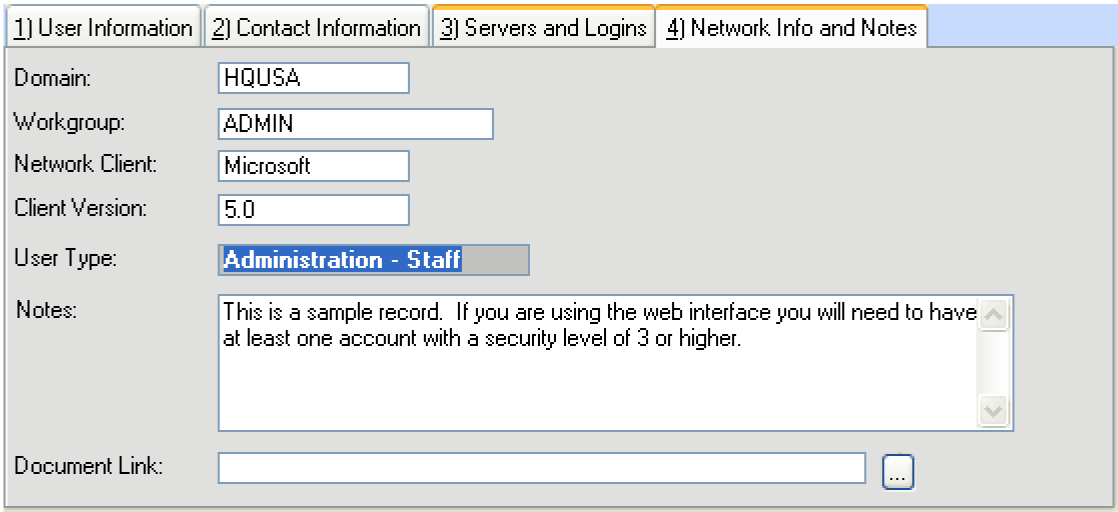
Notice on the contact tab below, I have added an Extension field. This is since many users may be at the same location and have the same main phone number, but a different extension number.



The third tab allows you to record (optionally) up to 3 sets of credentials for a user. In many organization, lost or forgotten passwords are the source of many help desk calls. This tab may be useful.



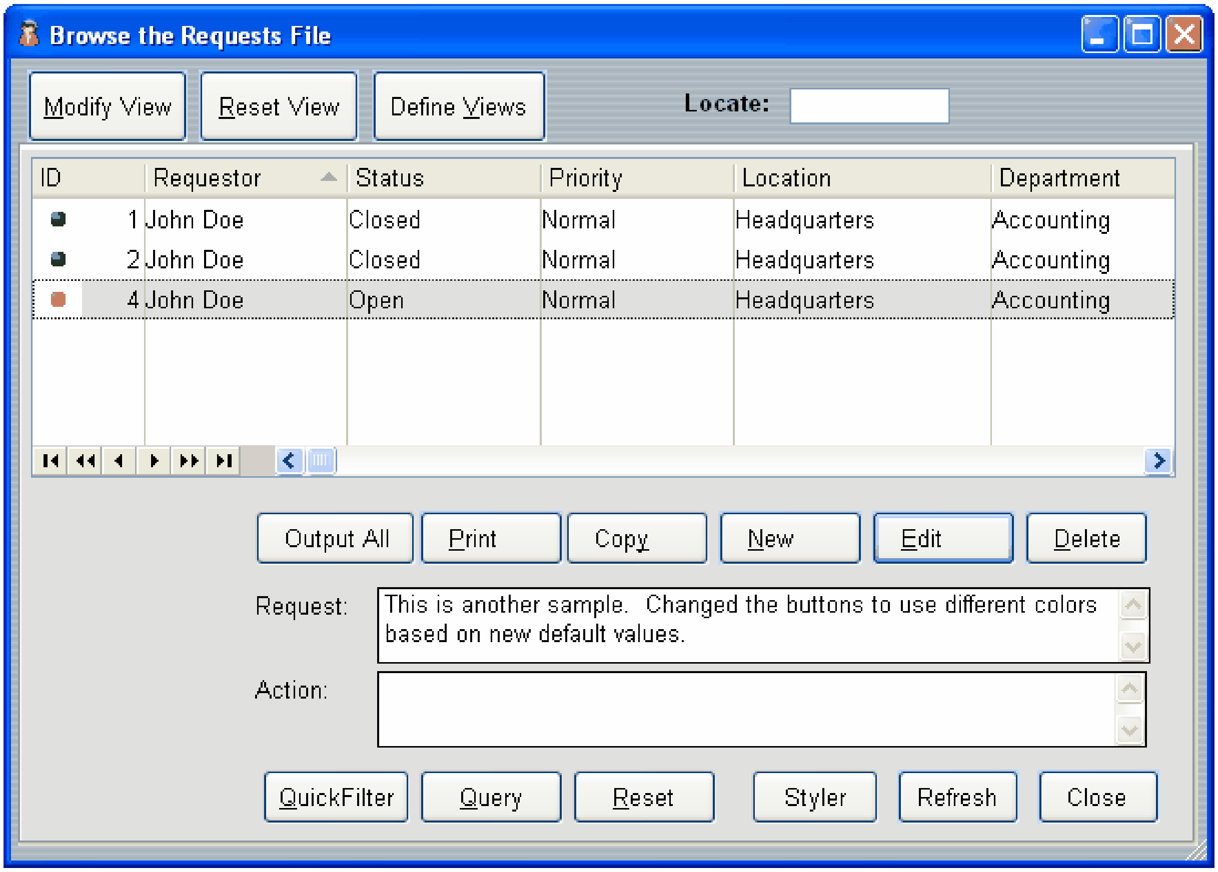
The final tab provides information you may want to record about a users Domain, workgroup etc. A user type field has been added in this release (2007) and in addition to a Notes field, this tab has a Document Link field which may be useful for associating a file with each user record.



3.3 Browse Requests

Browse the Requests File

This is the screen you will use most often. It shows support requests in rows and columns like a spreadsheet. I have set up a small icon on the ID field to help you quickly see requests by Status. A red icon will indicate requests where the status is equal to the default status for New Records, a Green Icon for requests with status equal to your default status for completed requests, and a Blue icon for other request statuses. Modify, Reset and Define View buttons allow you to use the View Wizard to create, or select a view for the columns displayed.



The columns displayed begin with an automatically generated number for each request. The Output all button is used to export all records to an Excel spreadsheet. This may be faster and in some ways better than the spreadsheet wizard. Also, a Style Manager has been added. This button will allow you to set fonts and colors for rows matching conditions specified by you. You can apply formatting to any or all columns using the new Style Manager.

The ID field is followed by the Request Date and Time, the Requestor, Type and Category of Request and so on. The Request and Action are displayed (read only) to give you a preview as you scroll through requests. The Quick Filter button will let you filter the data based on a single field for an exact value. The Query button calls the Query Wizard for you to use more complex filters, and saved queries, while the Reset button will remove any query filter and show all records.

The Print button will preview a full page report of the selected request. The New button will open an update form for you to add a new record, while the Edit button will display the selected record. The Delete button will remove the selected record from the database.

The Refresh button will check the database to see if records have been added or changed by another user on the network using the Windows application, or by someone using the web interface. NOTE: In this version updates by other users of the windows application on your LAN accessing the same database should see changes almost immediately.

The Close button will close the browse screen.

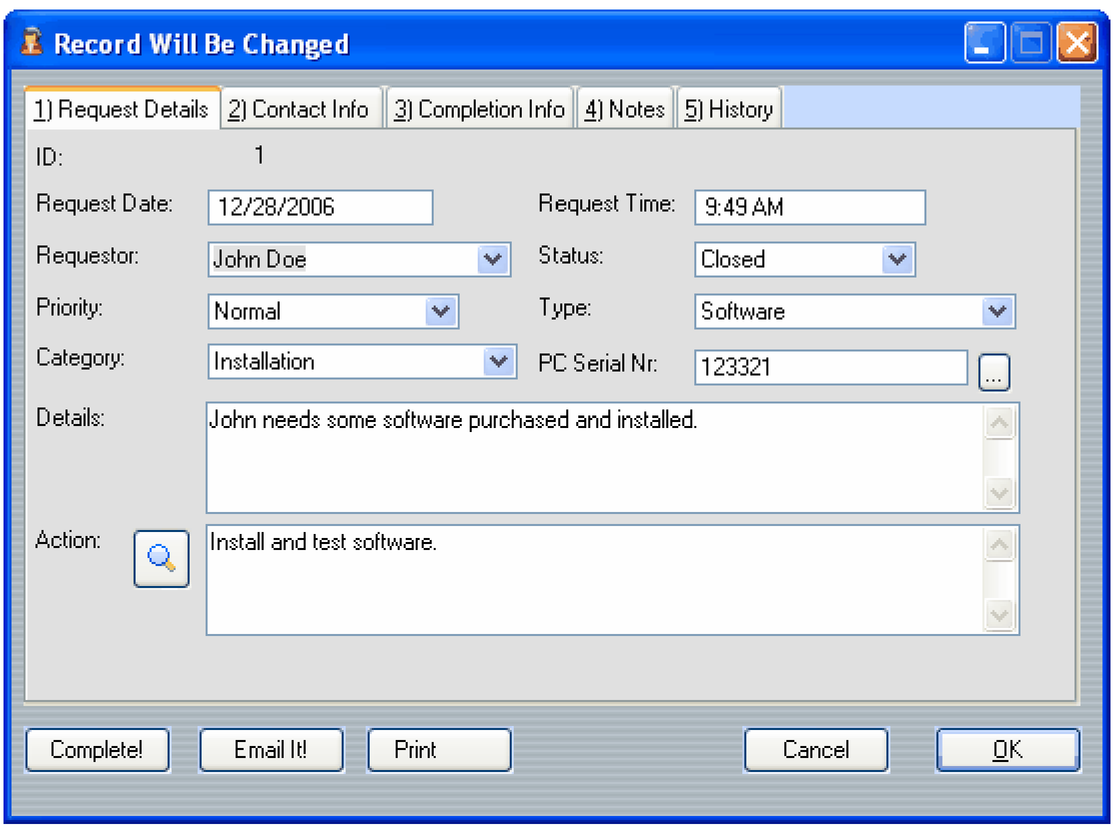
As you navigate through the records in the browse screen, the Request and the Action fields are displayed in large boxes so you can "preview" the record without opening the request form.

3.4 Update Requests

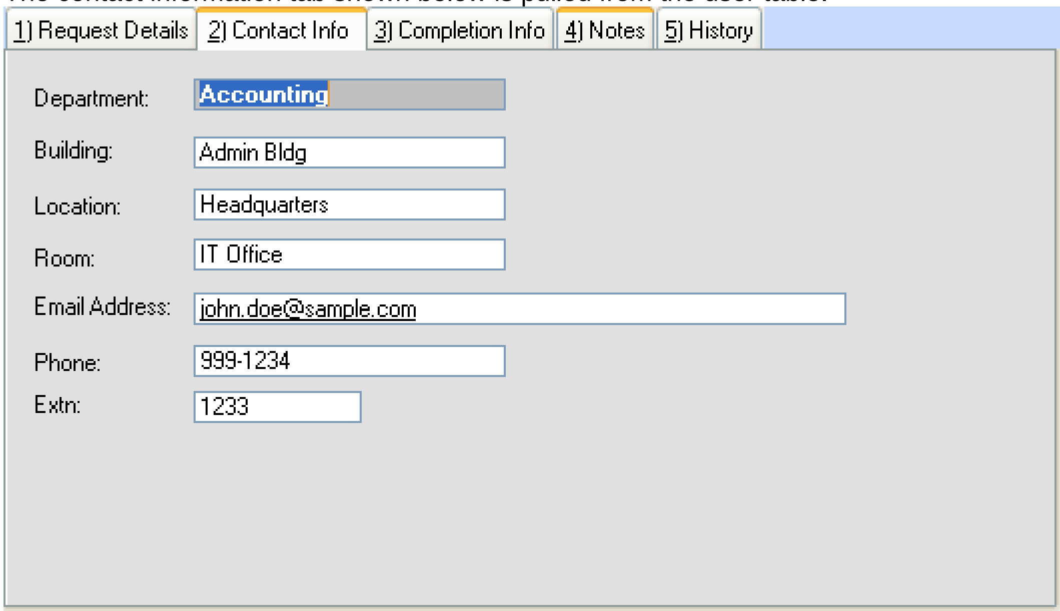
Update the Requests File

This screen is used to add or update support requests. The screen is like a fill in the blank style form. When you are adding a new request, an ID will be generated automatically and the current date and time will be used to fill in the Request Date and Request Time fields. If adding a request from the Update User screen, the user information will already be filled in for you. If this screen is called from the main Browse Requests screen, when you select a user name from the drop down list, relevant information about the user will be pulled in from the user table - this will be mostly on the second tab, contact information.. If you are adding a request for a user that has not been created, you can just type the user's full name in the list box and the Update User form will be popped up to let you add the user information "on the fly". Drop down boxes let you quickly select the Type and Category of request. I have also provided a field for you to record the serial number associated with a request. Click the ... button to browse for the computer and select it. This may be useful in queries where you want to determine how many requests have been related to a particular computer.

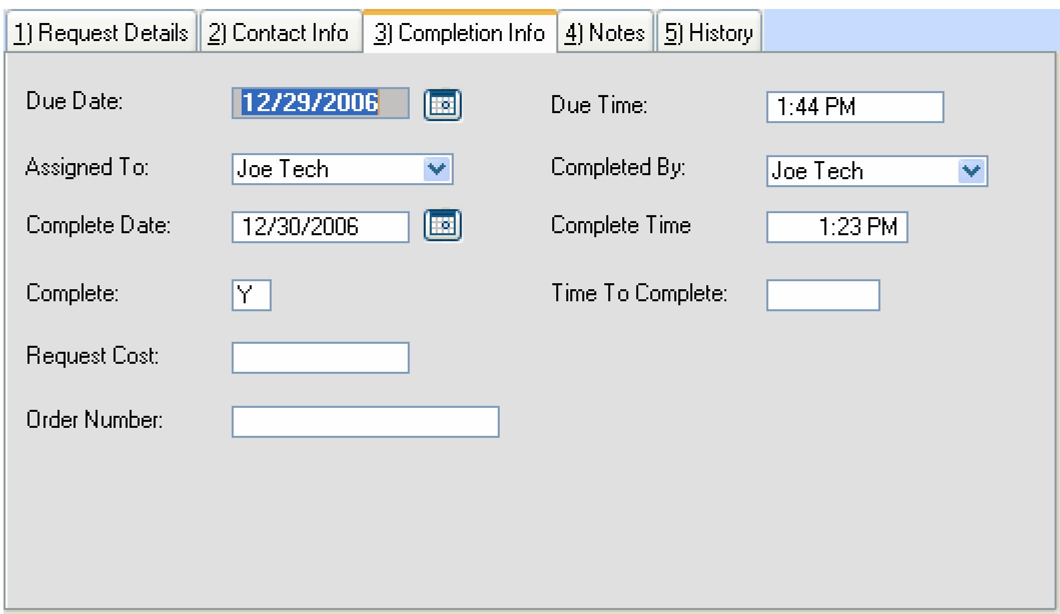
The Details text is required - you won't be able to save a request record if that field is blank. You can type in a value for the Action field, or click the button with the magnifying glass's to search from the Common solution table. This may save you some typing if you think about how many times an action taken or planned is a "common" solution, such as Reset Password, install software, etc.



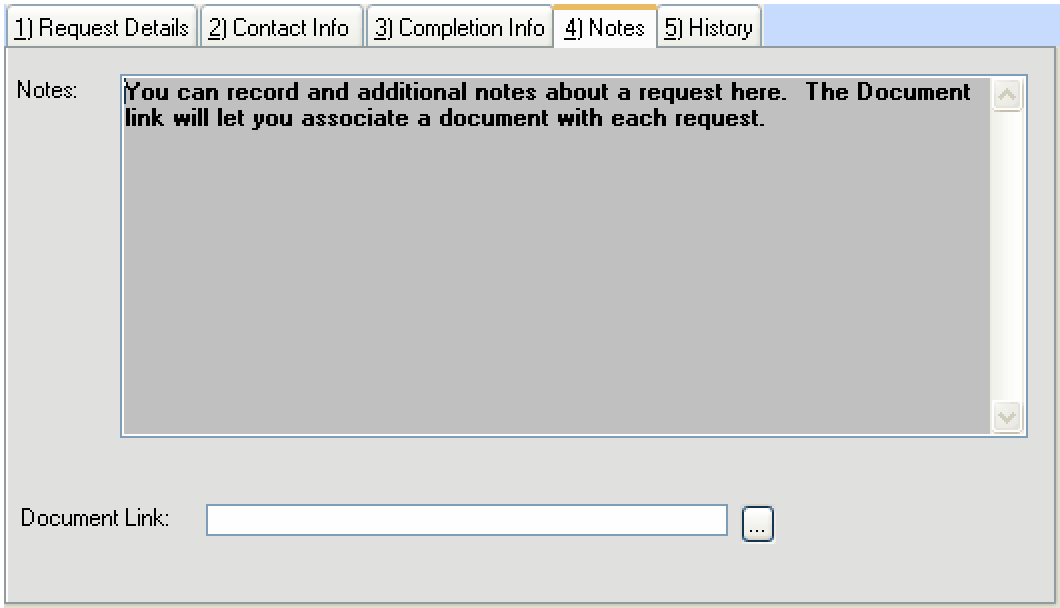
The contact information tab shown below is pulled from the user table.



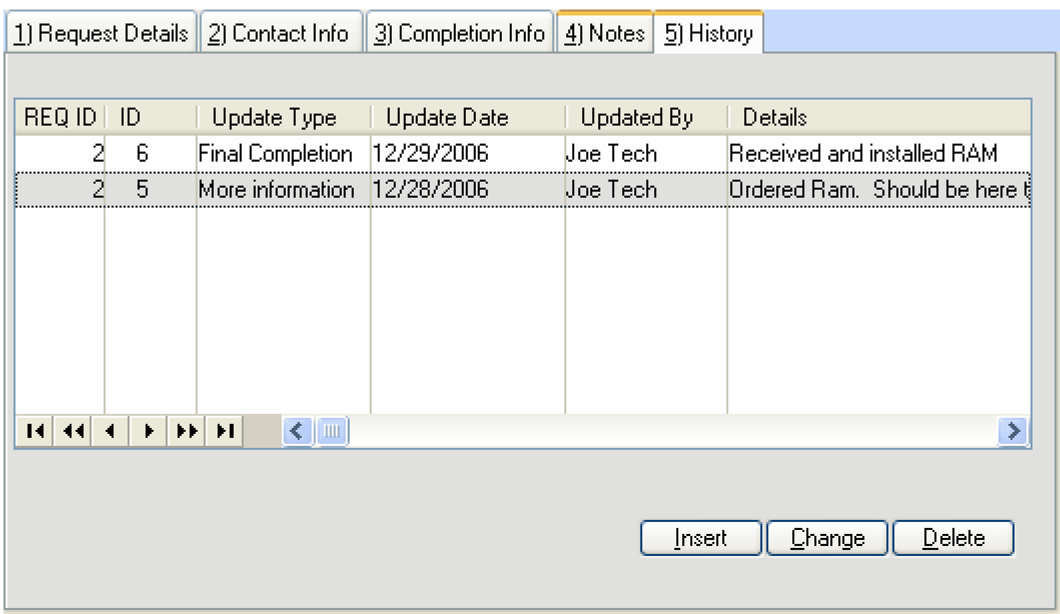
The Due Date and Due Time will be entered automatically when you add a new requests based on the Default Values. The Assigned To and Completed By fields are populated from the technicians file. When you click the Complete Button the current date and time are used to fill in the Complete Date and Time, Complete is set to Y and the Completed By value is set based on the Assigned To value.



The fourth Tab lets you add any notes, and new in version 2007, a document may be associated with each request.



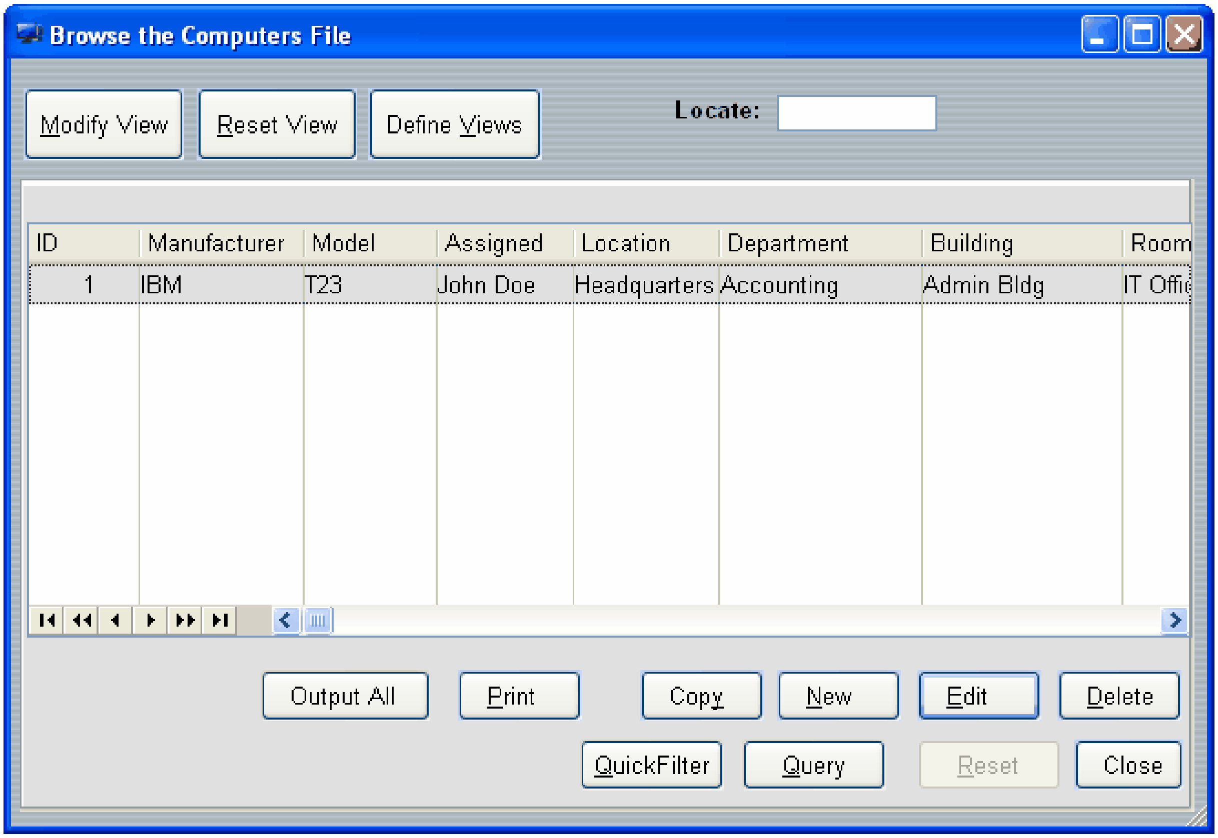
The History Tab is new in version 2007 and will let those that have a need, record subsequent or follow up items with each request.



(NOTE: if you are using the web interface you may only be updating records, the adding of requests would be done by the end user via the web pages.)

3.5 Browse Computers

Browse the Computers File



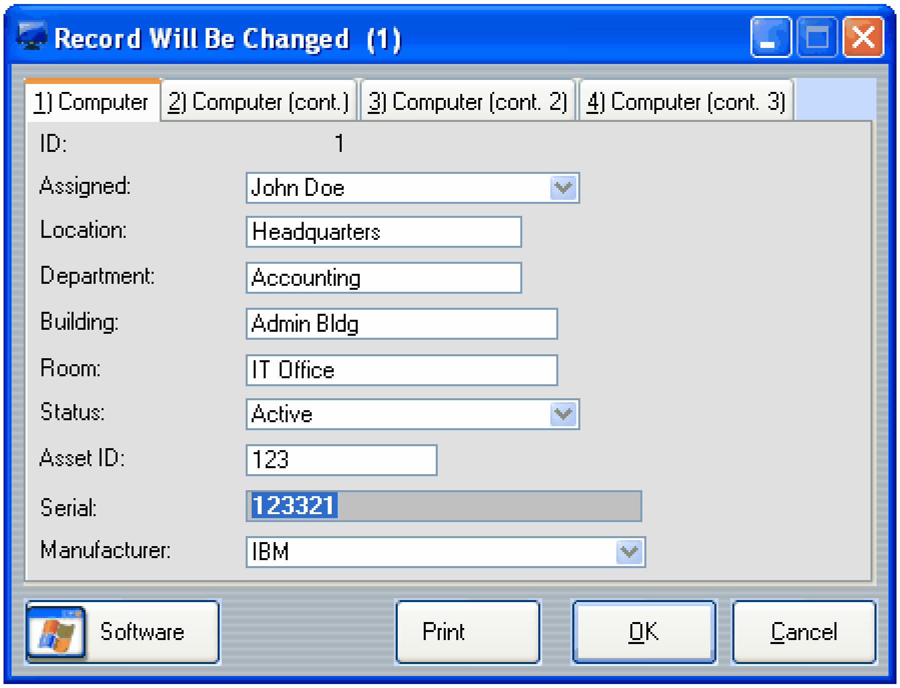
This screen is used to view computer information. It shows computer information in rows and columns like a spreadsheet.

Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record. A Copy button will create a duplicate record, just changing the ID field. This may be helpful if you want to modify a similar record, to just change the assigned user or a few other fields. A print button will print a full page report of the selected record.

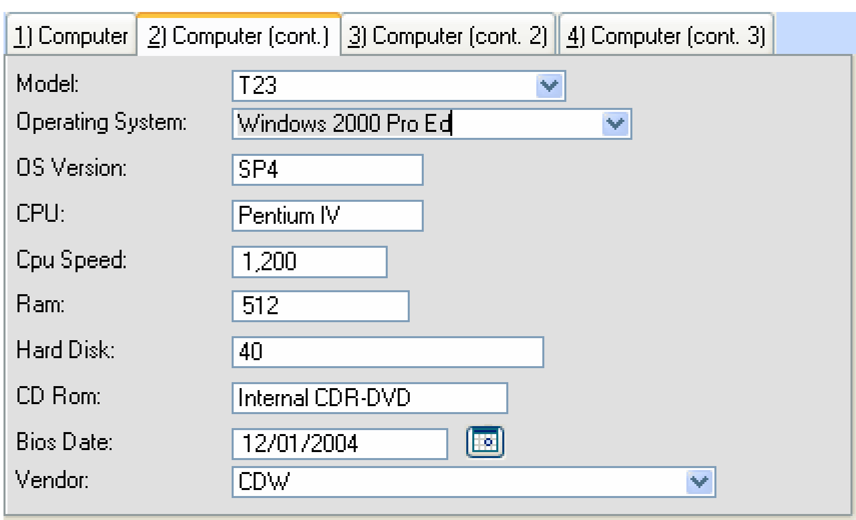
3.6 Update Computers

Update the Computers File

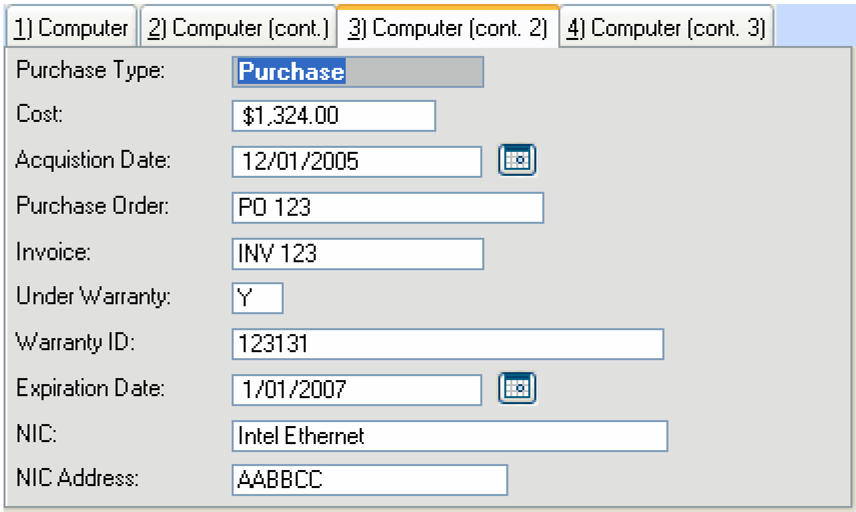
This screen is used to add or update information about a computer. A button is provided to launch the software installed on that PC screen. The ID is an automatically generated number for each computer record you add. When you select the Person assigned a computer from the drop down list, the Location, Department, Room and Building will be looked up and filled in for you from the user record. New in version 2007 is a Status field to let you record the status of the computer (in use, being repaired, etc). You can next record a unique Asset ID and Serial Number for each computer. The last field on the first tab is for the Manufacturer of the computer.



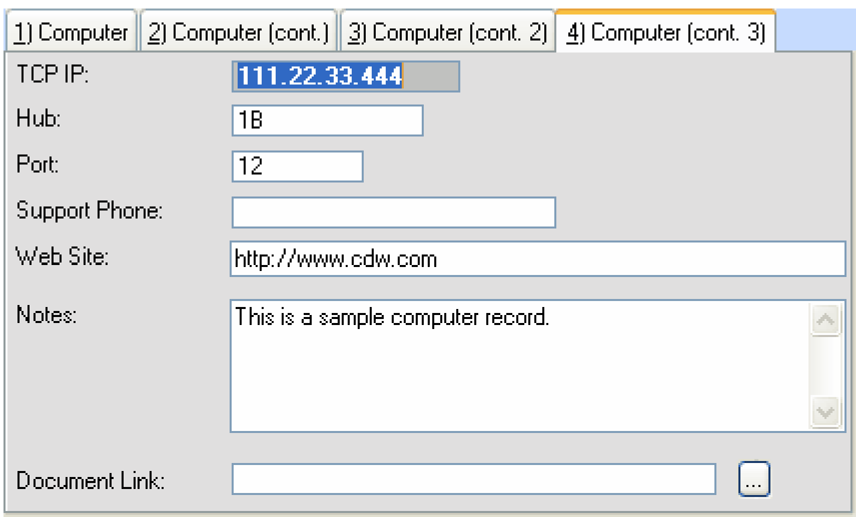
The next tab lets you record the model number of the PC. Next, select the PC Operating System from the drop down list. You may also record the OS version (or service pack level) of the PC. A character field is provided to let you enter the CPU type (Pentium, PIII, etc) and a numeric field is provided to let you record the CPU speed of the computer. Numeric fields are also provided to let you enter the amount of installed RAM and the size of the Hard Disk Drive. A character field will let you record information about the CD in the computer, such as CD/RW, DVD, etc. The BIOS Date can be entered manually or by using the Calendar popup. You can select the Vendor you purchased the computer from using the drop down list.



The third tab lets you record additional information such as the Purchase Type (some organizations lease computers rather than a purchase), the cost, and so on.



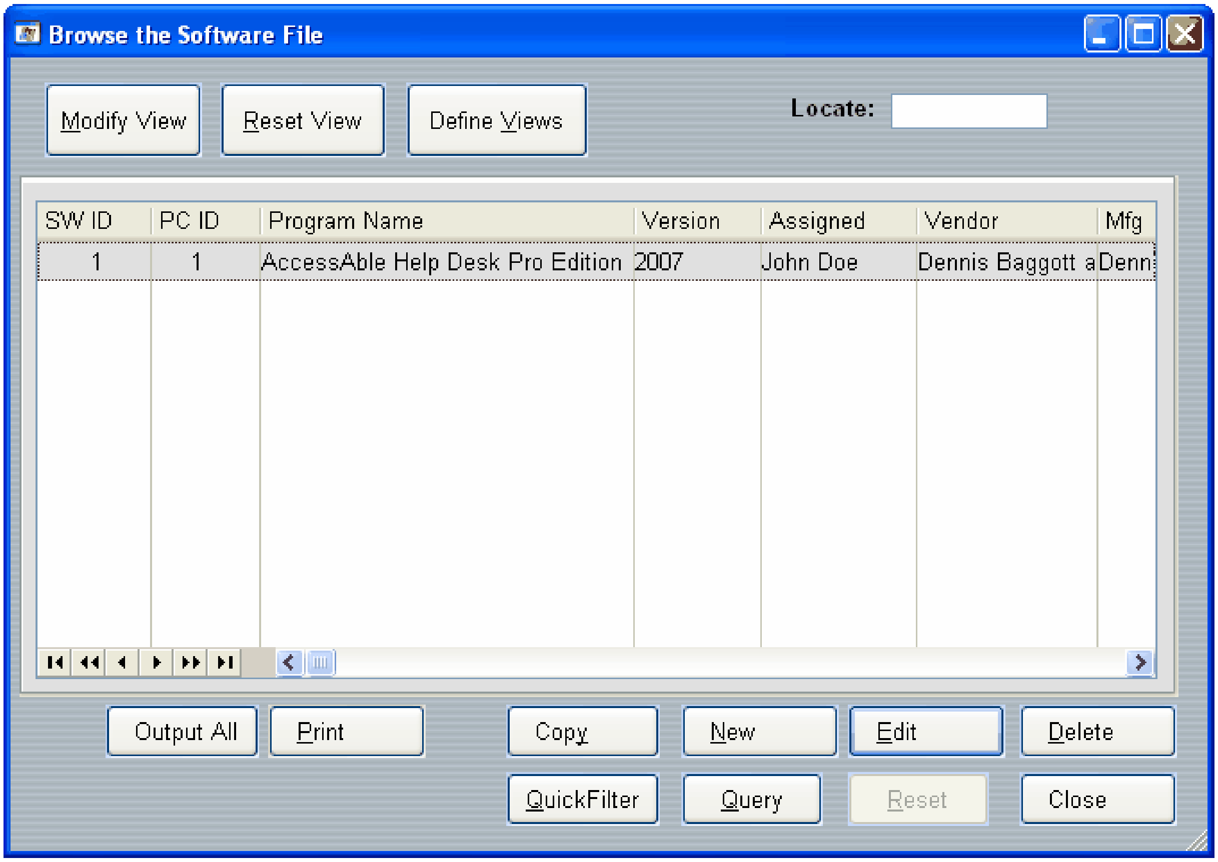
The final tab lets you enter information about the network connections for the PC as well as support phone number and web site.
You may also enter additional notes about a computer and new in version 2007 is a document link field to let you associate a file
with the computer.



3.7 Browse Software

Browse the Software File

This screen shows the software inventory in rows and columns like a spread sheet.



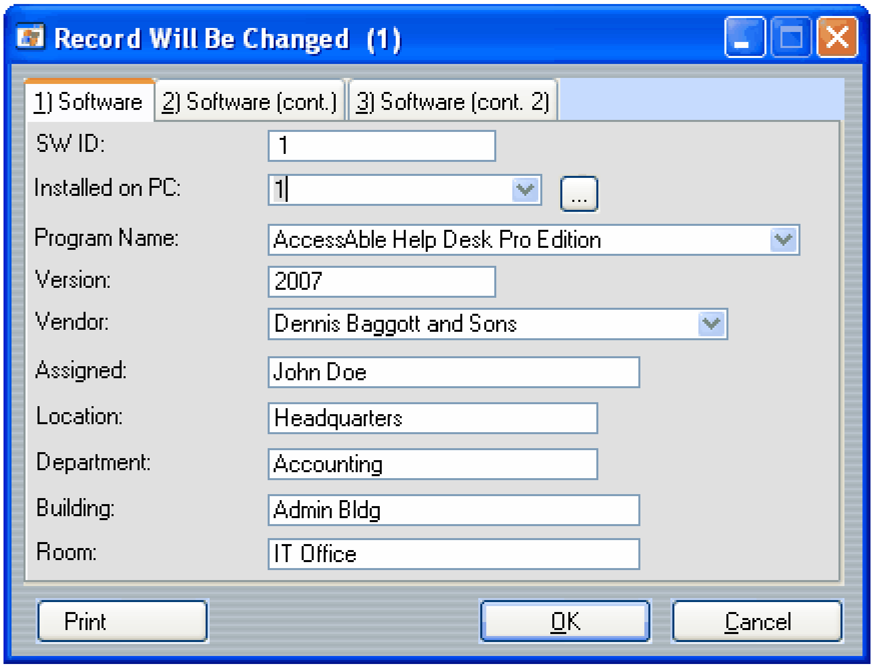
Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record. A copy button will create a new record that is a duplicate of the selected record which can then modify selected fields without having to create a new record from scratch. A Print button will let you preview a report of the currently selected record. An Output All button will launch Microsoft Excel (if you have it installed) with a spreadsheet containing all the records as displayed in the browse screen

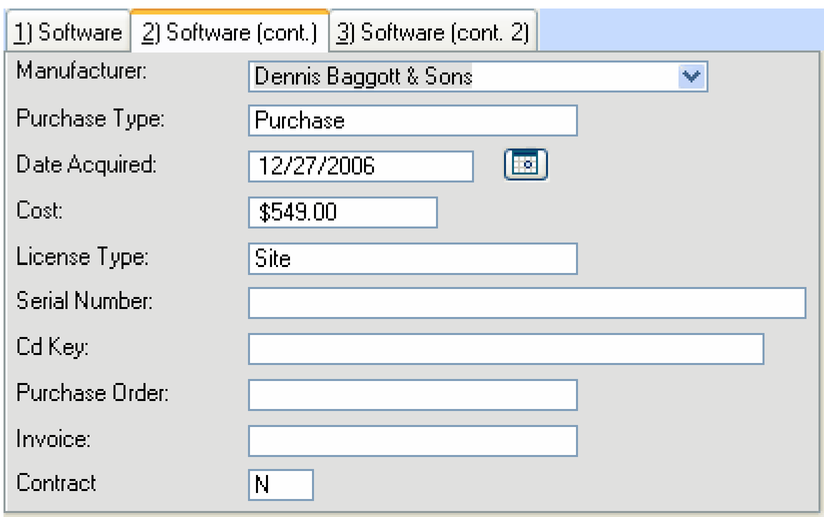
Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record.

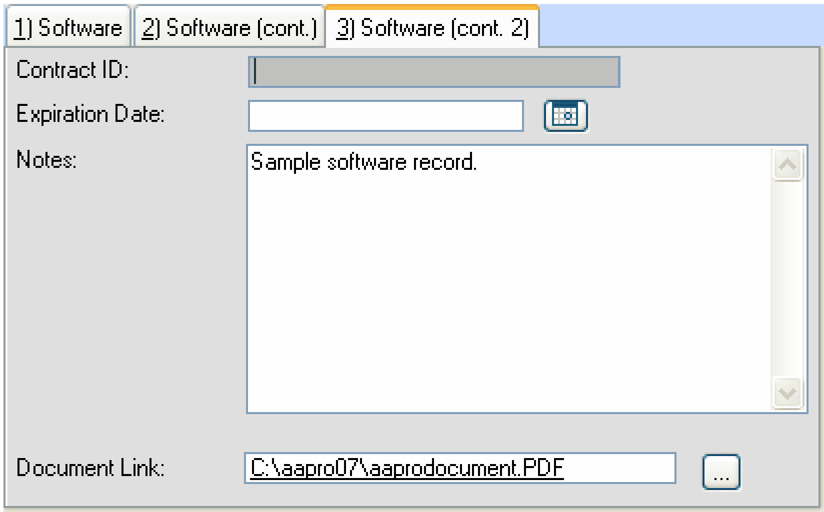
3.8 Update Software

Update the Software File

This screen is used to add or change software in use at your organization.


Record Will Be Changed (1)
1) Software
2) Software (cont.)
3) Software (cont. 2)
SW ID: 1
Installed on PC: 1
Program Name: AccessAble Help Desk Pro Edition
Version: 2007
Vendor: Dennis Baggott and Sons
Assigned: John Doe
Location: Headquarters
Department: Accounting
Building: Admin Bldg
Room: IT Office
Print
OK
Cancel


1) Software
2) Software (cont.)
3) Software (cont. 2)
Manufacturer: Dennis Baggott & Sons
Purchase Type: Purchase
Date Acquired: 12/27/2006
Cost: $549.00
License Type: Site
Serial Number:
Cd Key:
Purchase Order:
Invoice:
Contract N



A Software ID field will be incremented by 1 each time you add a record. A list box is provided to let you select the computer the software is installed on. The program name can be selected from the drop down list box of Application Names. If you are adding a new program which has not already been setup you can just type the new application name in the list box and it will be added to the lookup table. A field is provided to let you record the version number of the program. You can next select the Vendor from the drop down list box and also enter the purchase type. This may be different from the Site License type. For example, the purchase may have been a one time order, or may be from a blanket purchase order. The Assigned User will be filled in based on the Installed On PC field. You can then enter the cost of the program. The Manufacturer can be selected from the drop down list box populated from the Mfgs lookup table. You can next enter the License type, such as Site or Individual. You can either type the Date Acquired or use the pop up calendar to select the date of the purchase. Serial Number and CD Key fields are also provided for those that want to record this information.

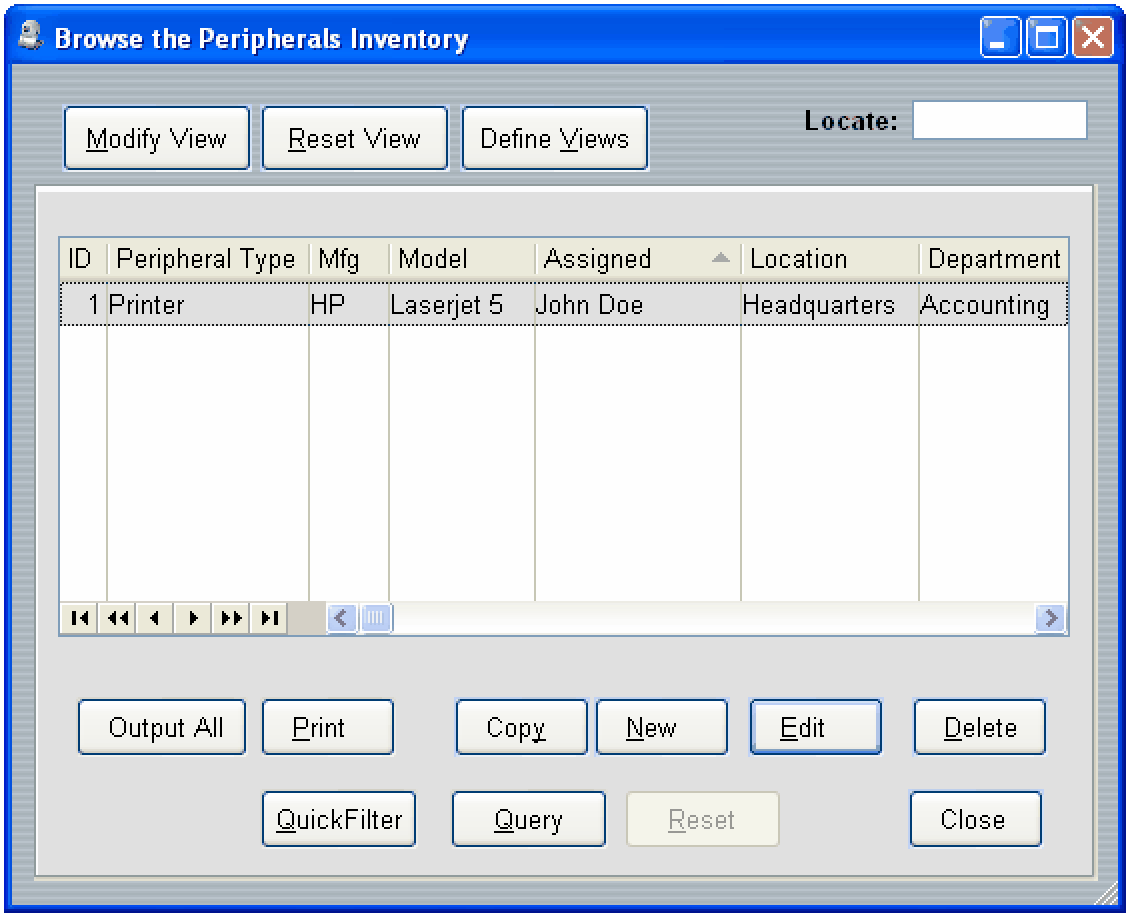
You can also record the Purchase Order number and Invoice number for the purchase. Sometimes a support contract may be purchased with software (not my software, though. Support is free to registered users, just limited to email). So I have provided a Y or N field to indicate if a support contract has been purchased, a Contract ID field, and a support Expiration Date field as well.

Finally, I have provided a large Notes field for any additional information you want to record.

3.9 Browse Peripherals

Browse the Peripherals File

This screen is used to view peripherals information. It shows peripheral information in rows and columns like a spreadsheet.



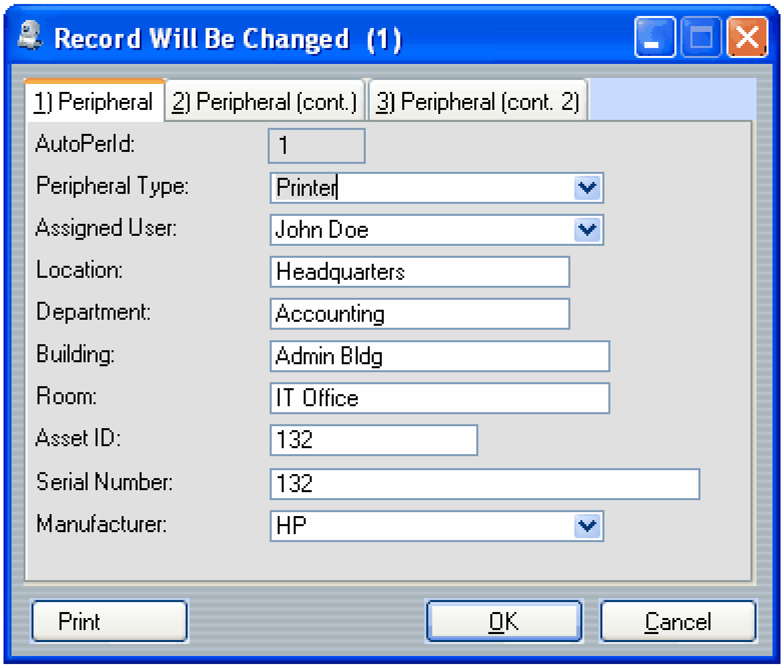
Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record. A copy button will create a new record that is a duplicate of the selected record which can then modify selected fields without having to create a new record from scratch. A Print button will let you preview a report of the currently selected record. An Output All button is used to launch Microsoft Excel (if you have it installed) with a spreadsheet containing all the records as displayed in the browse screen

3.10 Update Peripheral

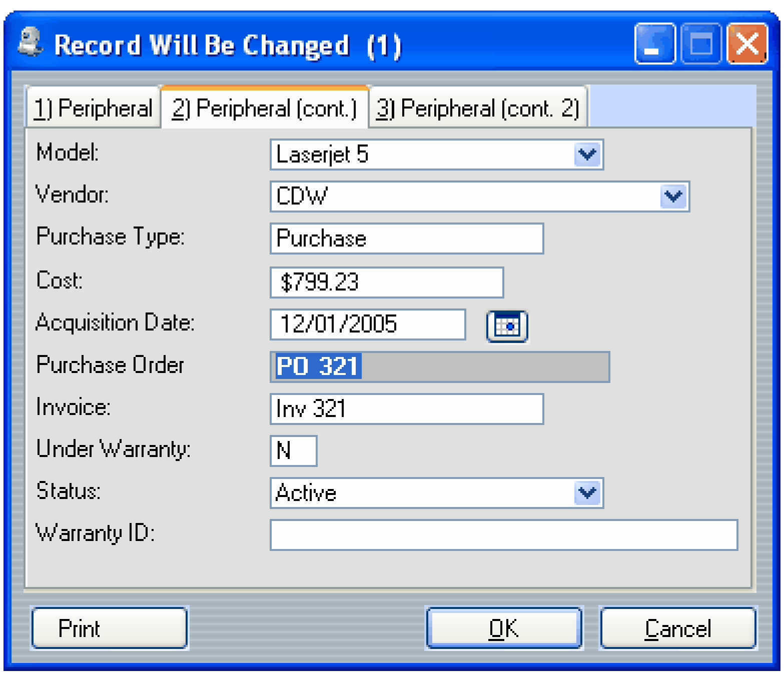
Update the Peripherals File

This screen is used to update peripherals.

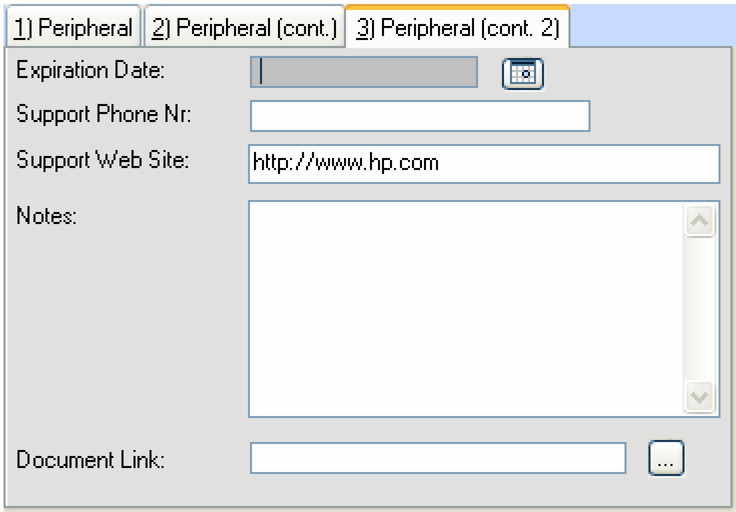
An ID will be automatically generated each time you add a peripheral record. Select the Peripheral Type from the drop down list. When you select the user assigned the peripheral, the values for the Location, Department, Room and Building will be "looked up" from the user table. You then enter a unique Asset ID and Serial Number and can select the Manufacturer from the drop down list.



On the next tab you can select the model from the drop down list, and also select a Vendor from the next drop down. Then enter purchasing related information, if desired. A Status field has been added in version 2007. You may want to indicate whether a peripheral is Active, Being Repaired, etc.

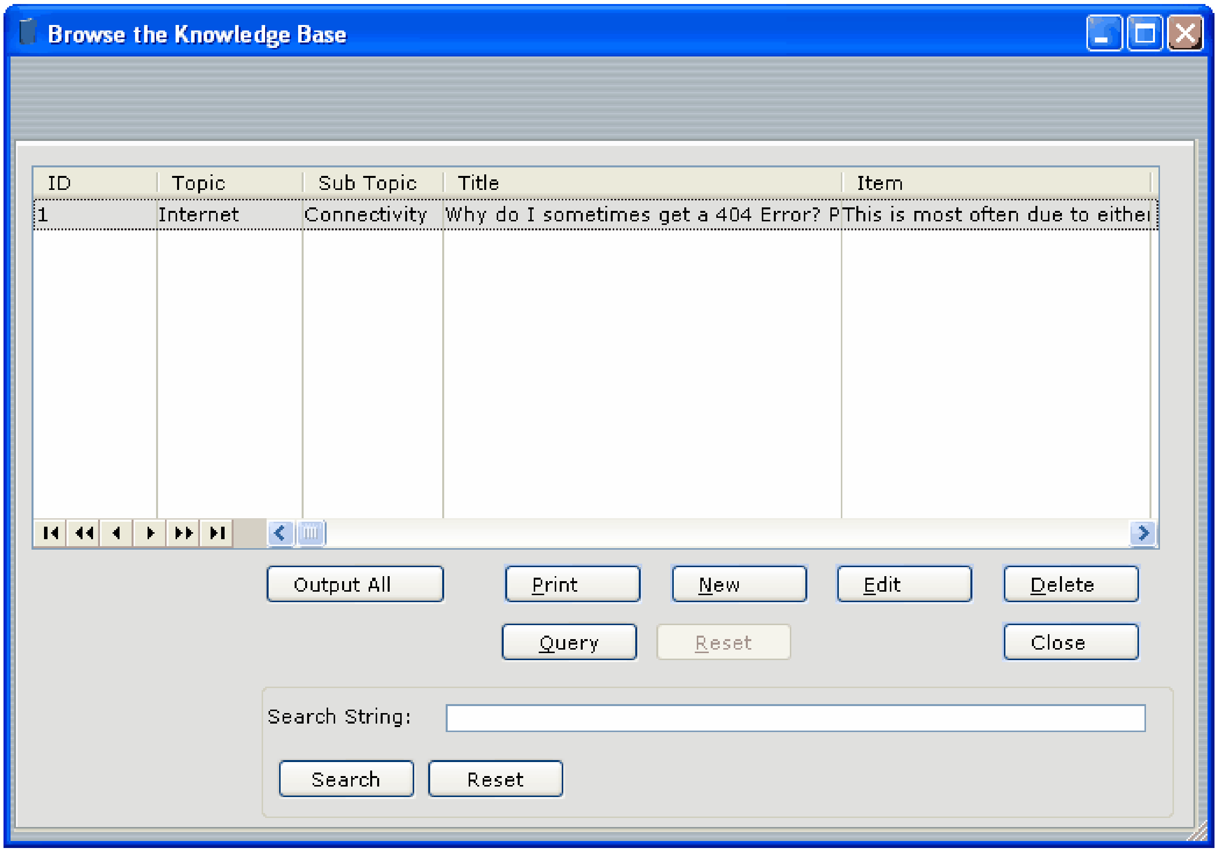


If the peripheral is under warranty you may record the Expiration Date on the last tab as well as any Notes. You may also use the new Document Link field to associated a file with the peripheral.



3.11 Browse Knowledge Base

Browse the Knowledge Base File

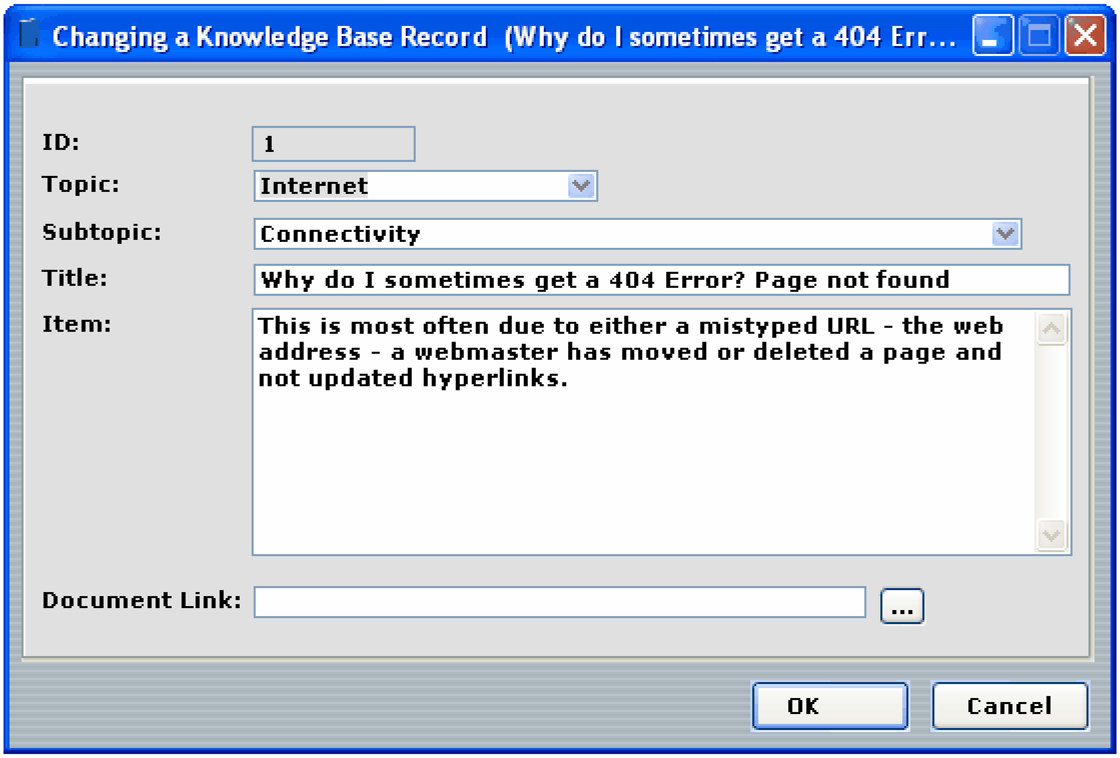


Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record. A Print button will let you preview a report of the currently selected record. New in this version is a button to launch Microsoft Excel (if you have it installed) with a spreadsheet containing all the records as displayed in the browse screen.

A search string box is also provided to let you enter a word or phrase to search for anywhere in any field. Click the Reset button to remove any filter created by using this feature.

3.12 Update Knowledge Base

Update the Knowledge Base File



This screen is used to update the knowledge base. You may select a Topic and Subtopic from drop down list boxes. Then enter a title for the item and then the Item details.

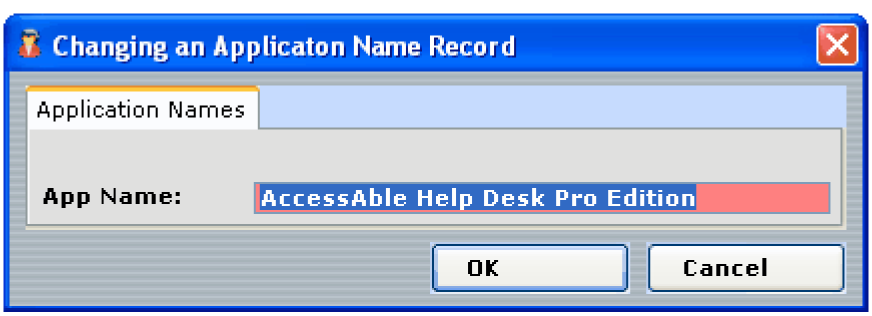
4 Lookup Tables

4.1 Browse Application Names

Browse the Application Names File

4.2 Update Application Names

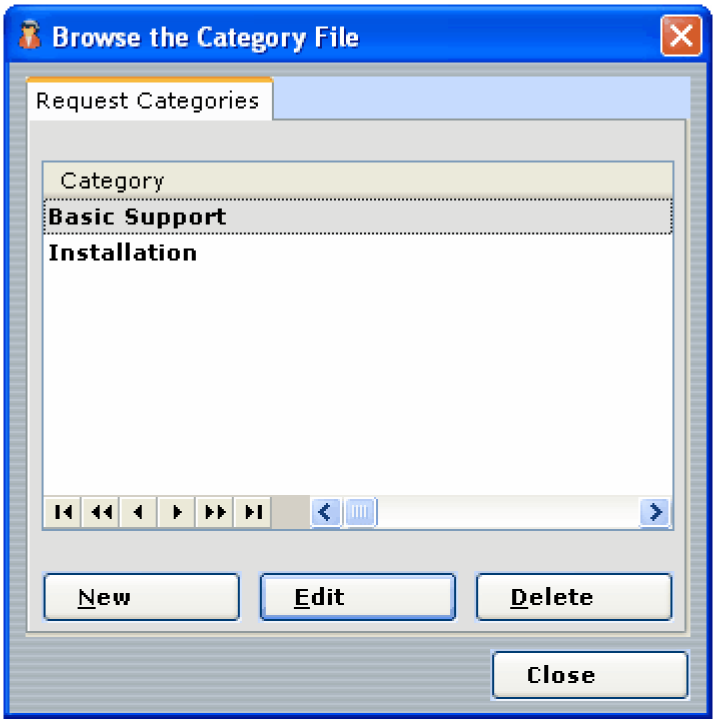
Update the Application Names File



This screen is used to add or change application names used as a lookup item when updating software records.

4.3 Browse Category

Browse the Category File



This screen shows the Request Category lookup table.

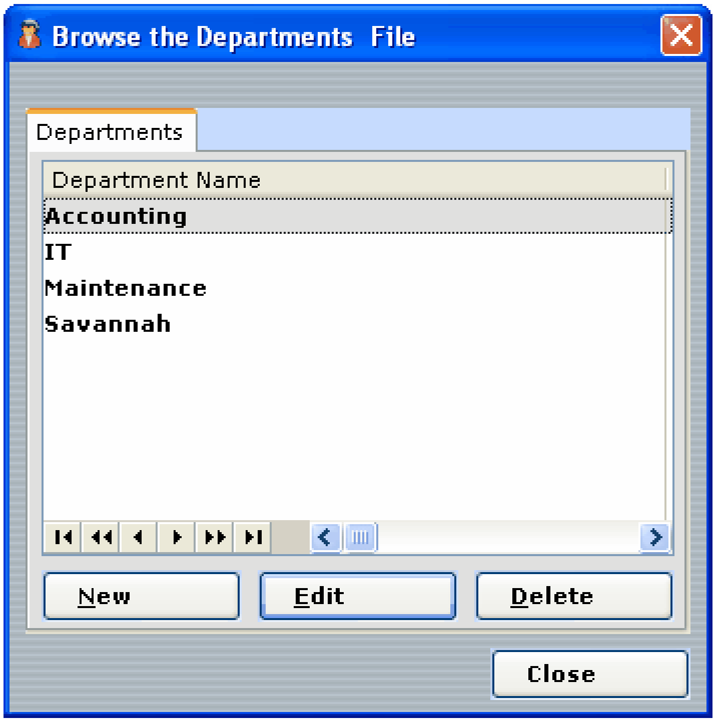
4.4 Update Category

Update the Category File

This screen is used to add or change a request categories.

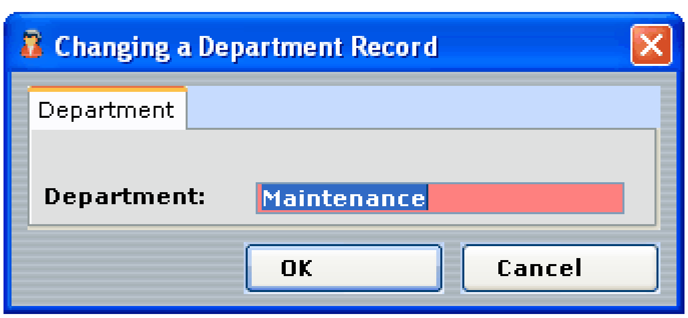
4.5 Browse Departments

Browse the Departments File.



4.6 Update Departments

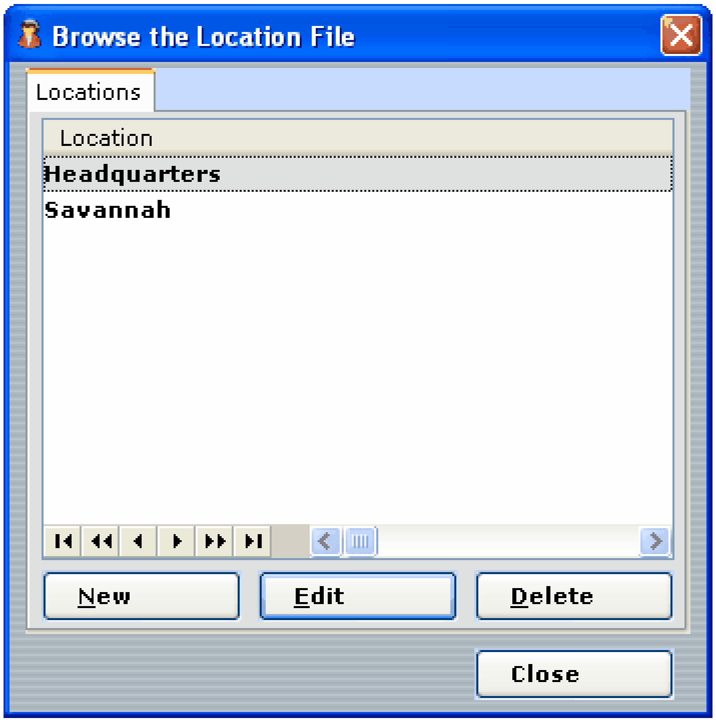
Update the Departments File



This screen is used to add or change a department name.

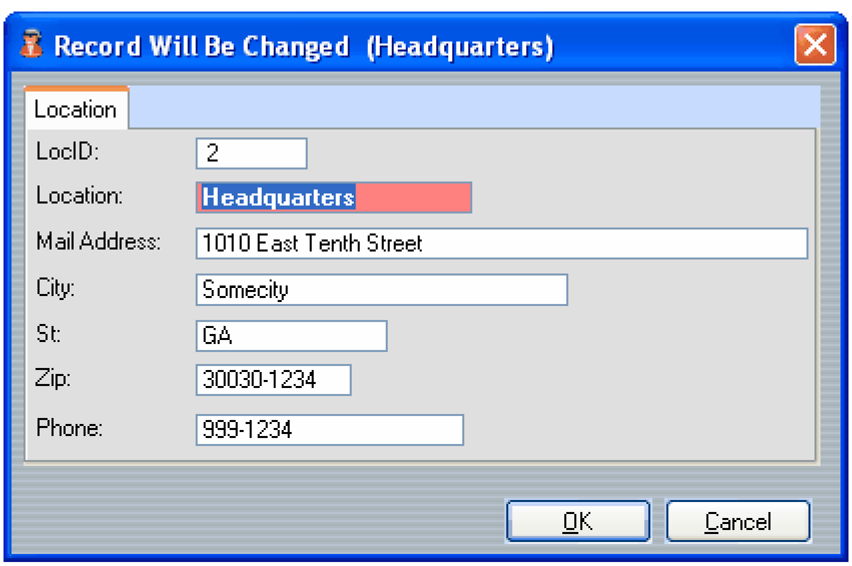
4.7 Browse Locations

Browse the Location File



4.8 Update Locations

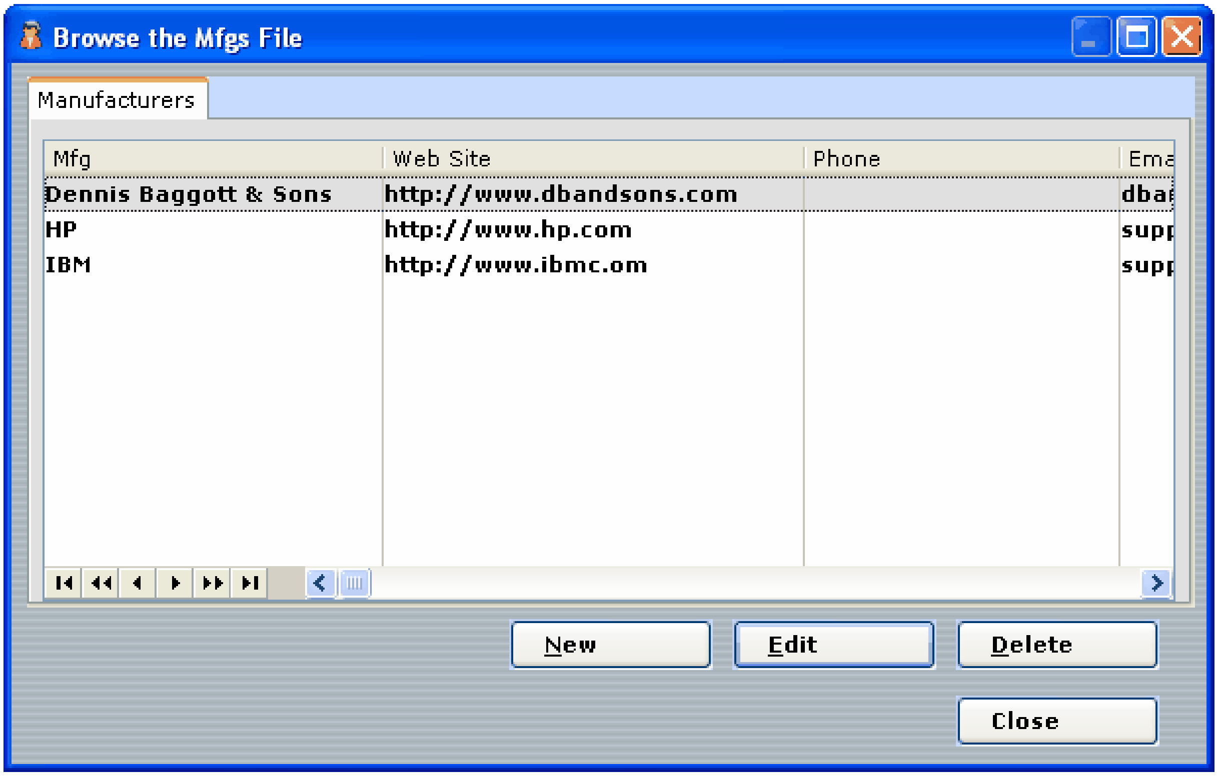
Update the Location File



This screen is used to add or update a location.

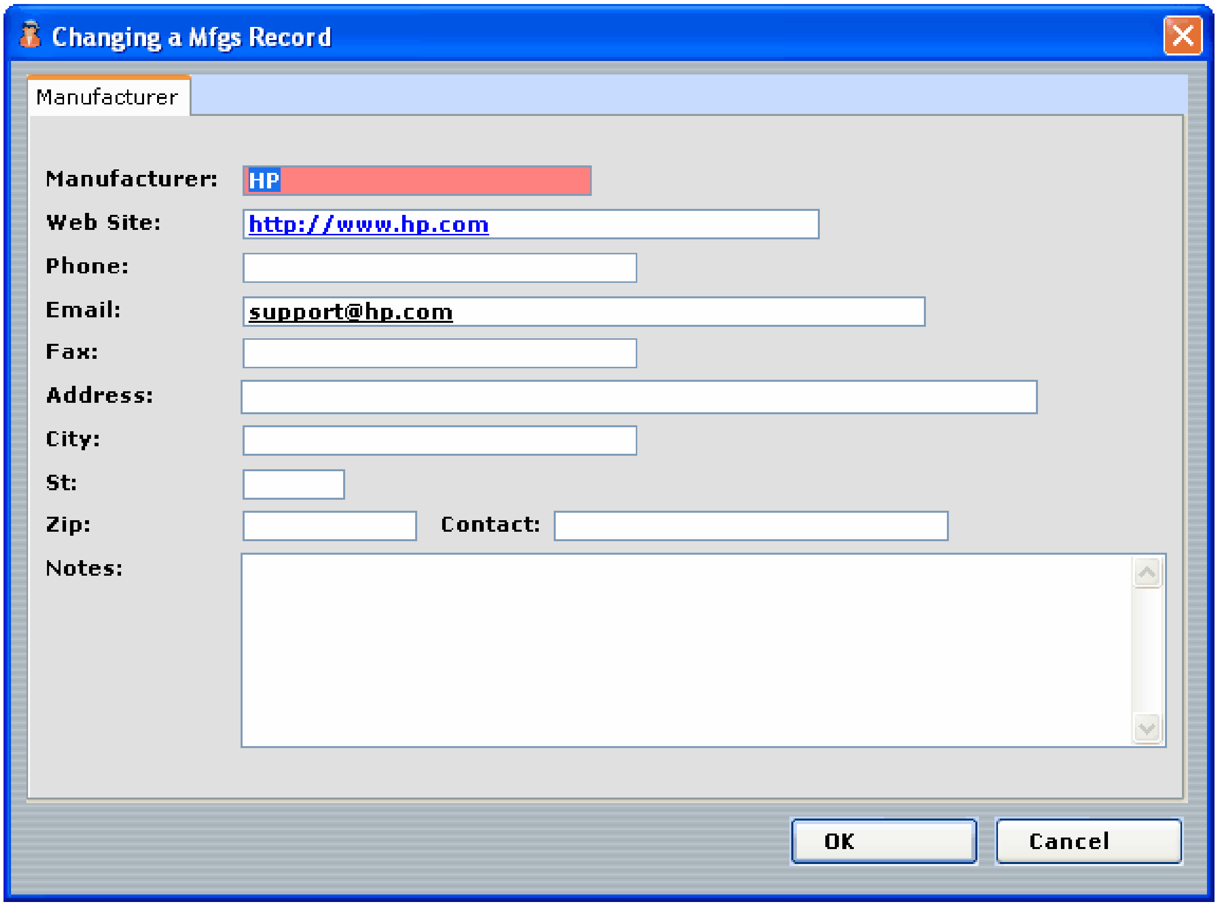
4.9 Browse Mfgs

Browse the Manufacturers File



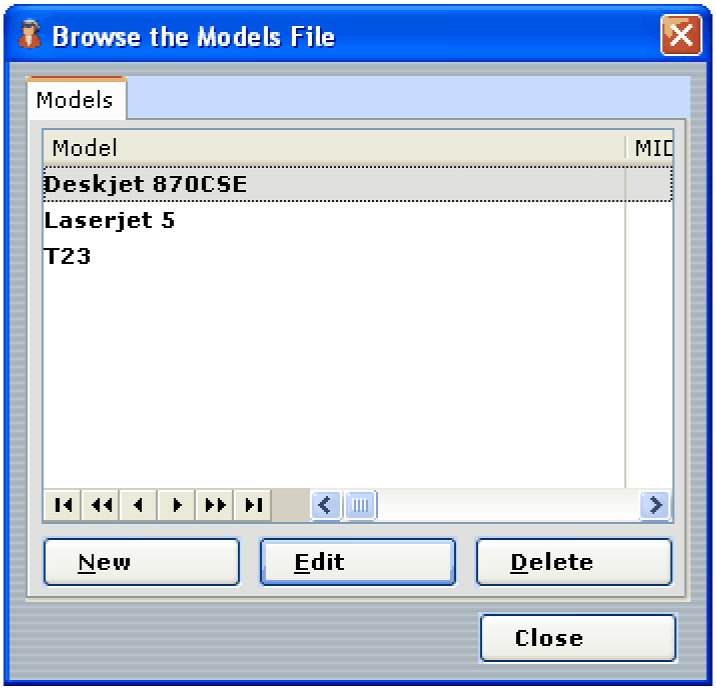
4.10 Update Mfgs

Update the Manufacturers File



4.11 Browse Models

Browse the Models File



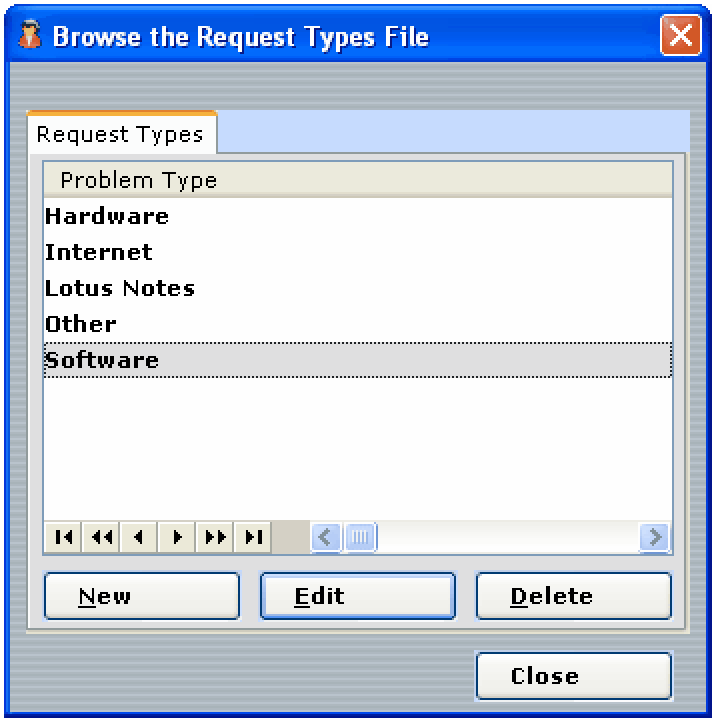
4.12 Update Models

Update the Models File

This screen is used to add or update a model number/name.

4.13 Browse Request Types

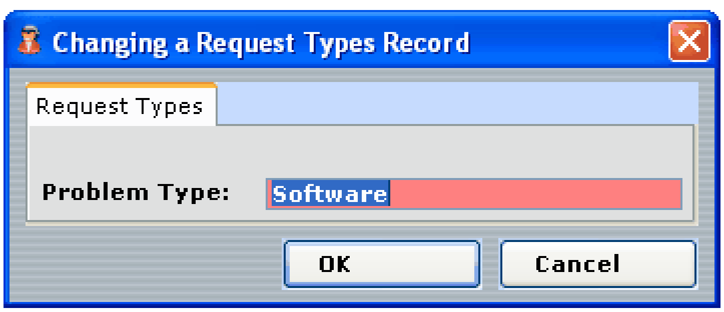
Browse the Request Types File



This screen shows the request types lookup table.

4.14 Update Request Types

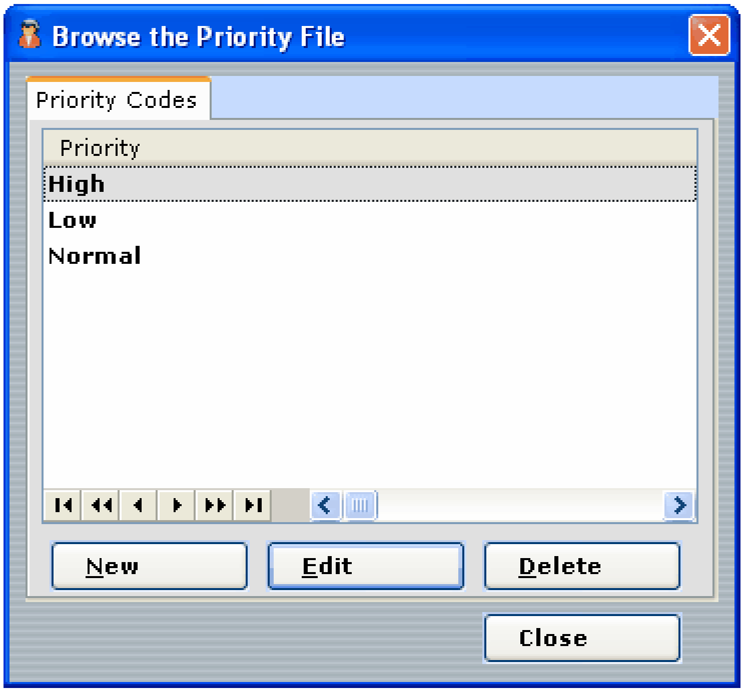
Update the Request Types File



This screen is used to add or update a request type.

4.15 Browse Priority

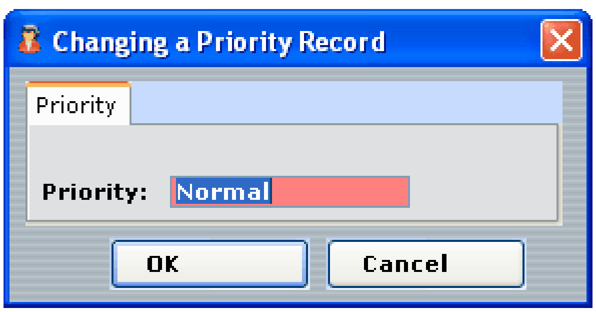
Browse the Priority File.



This screen shows the Request Priority lookup table.

4.16 Update Priority

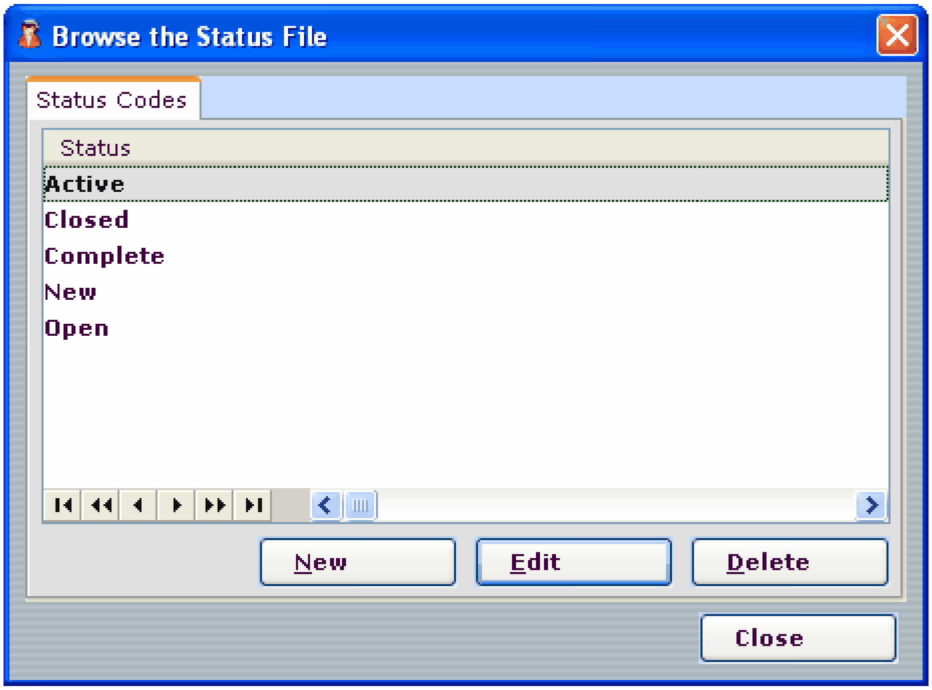
Update the Priority File



This screen is used to add or change a request priority code.

4.17 Browse Status

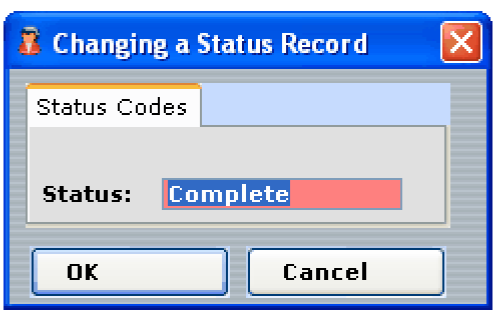
Browse the Status File



This screen shows the Request Status code table.

4.18 Update Status

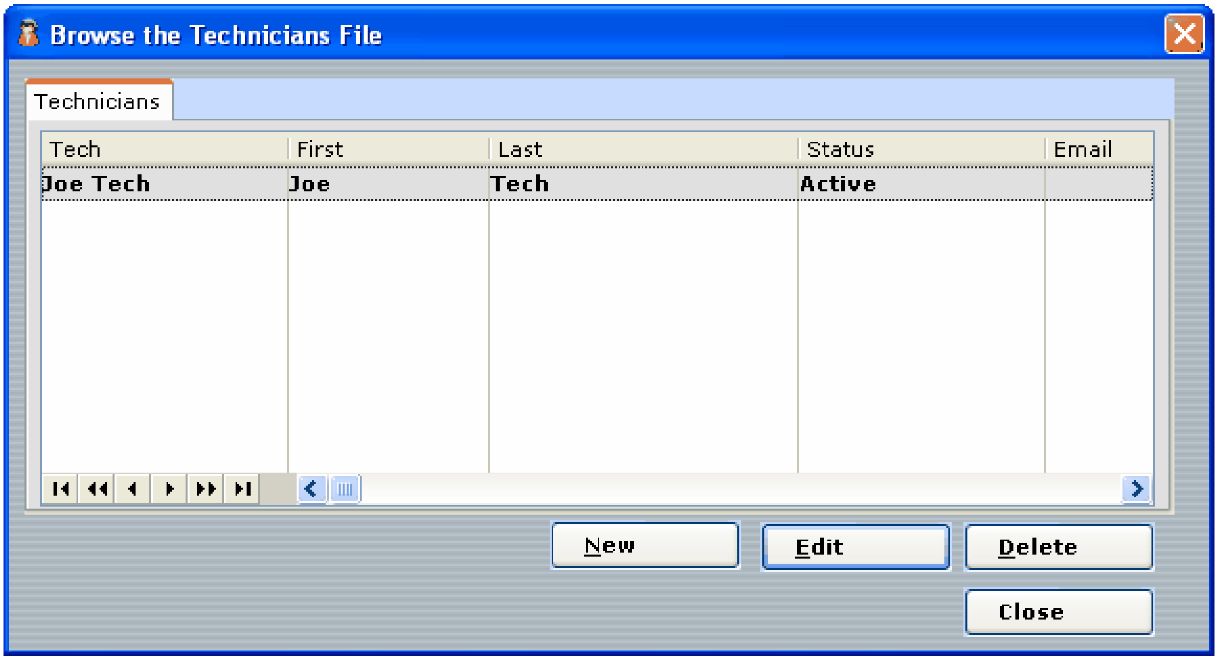
Update the Status File



This screen is used to add or update a request status code.

4.19 Browse Techs

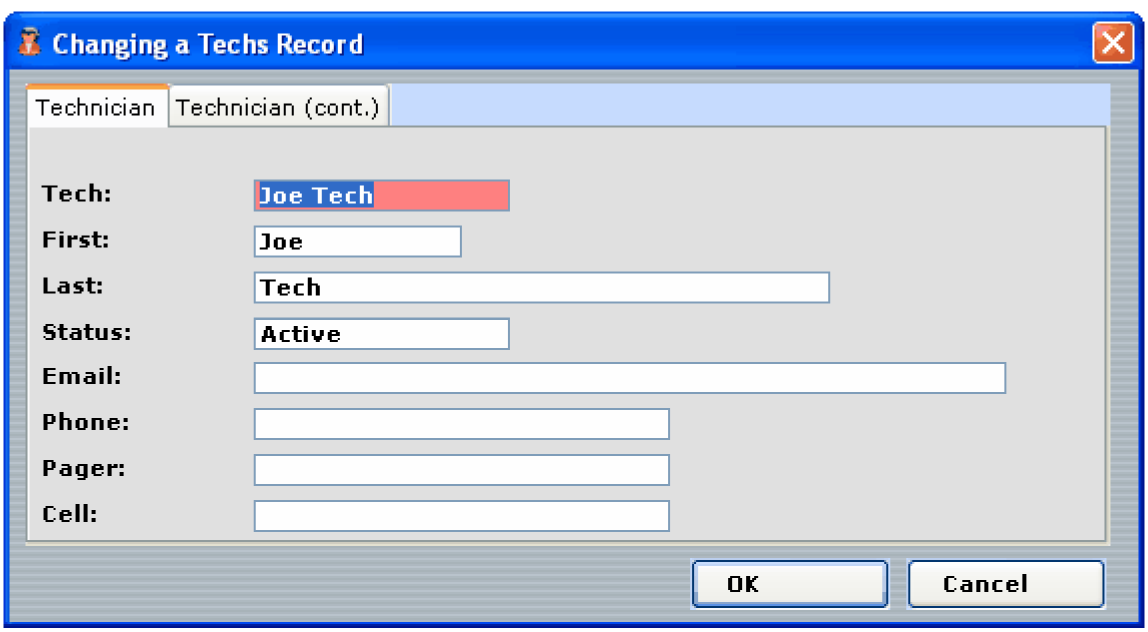
Browse the Techs File



This screen shows the technicians you have set up in rows and columns. If called to lookup a value, such as to complete the entry for the Assigned To field when updating a request, the Select button will be enabled. Click the New button to Add a new record, the Edit button to change the selected technician record, of the Delete button to remove the selected record from the table.

4.20 Update Techs

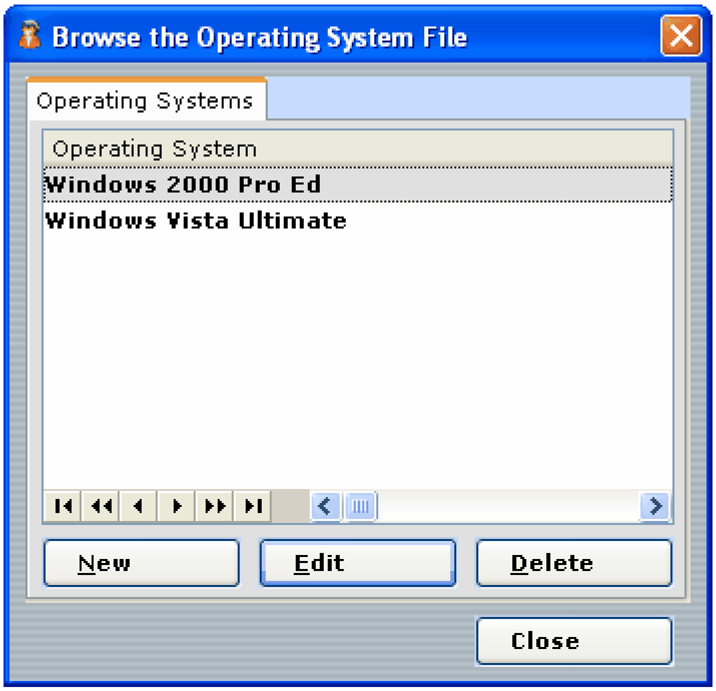
Update the Technicians File



This screen is used to add or edit technicians - or other items used for the Taken By field. There are two tabs for recording information in this table.

4.21 Browse Operating Systems

Browse the Operating System File



This screen shows operating systems you have defined for lookup when editing a computer record.

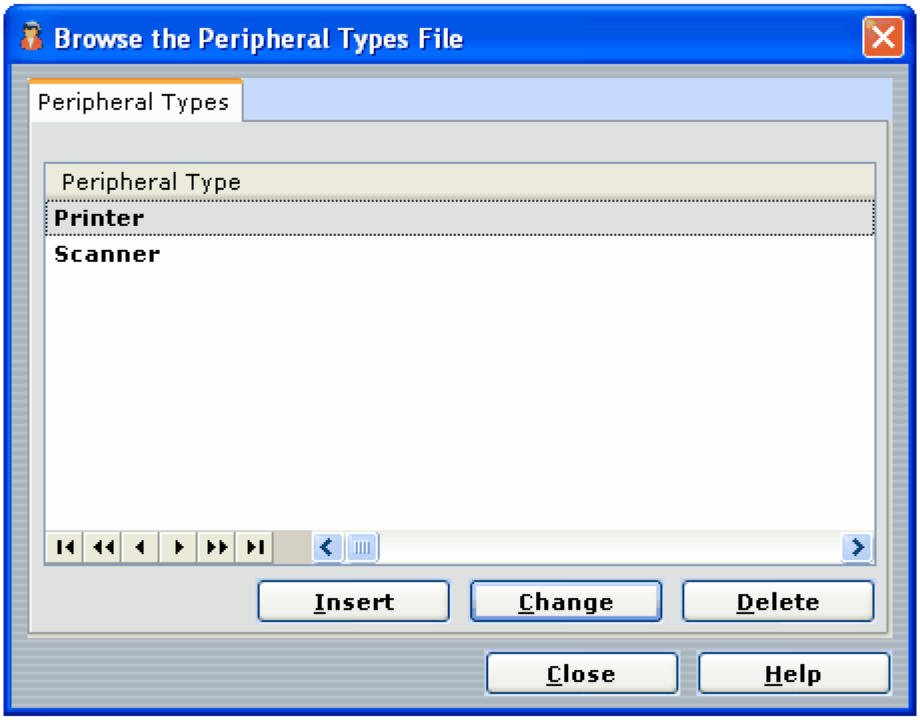
4.22 Update Operating Systems

Update the Operating System File

This screen is used to add or change an operating system description.

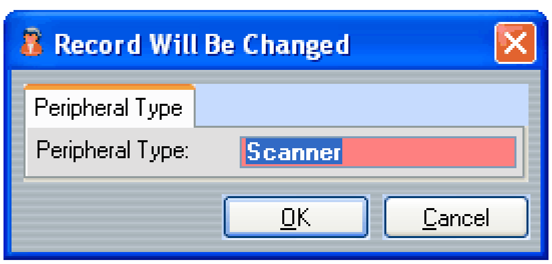
4.23 Browse Peripheral Types

This screen is used to view the Peripheral Types lookup table.



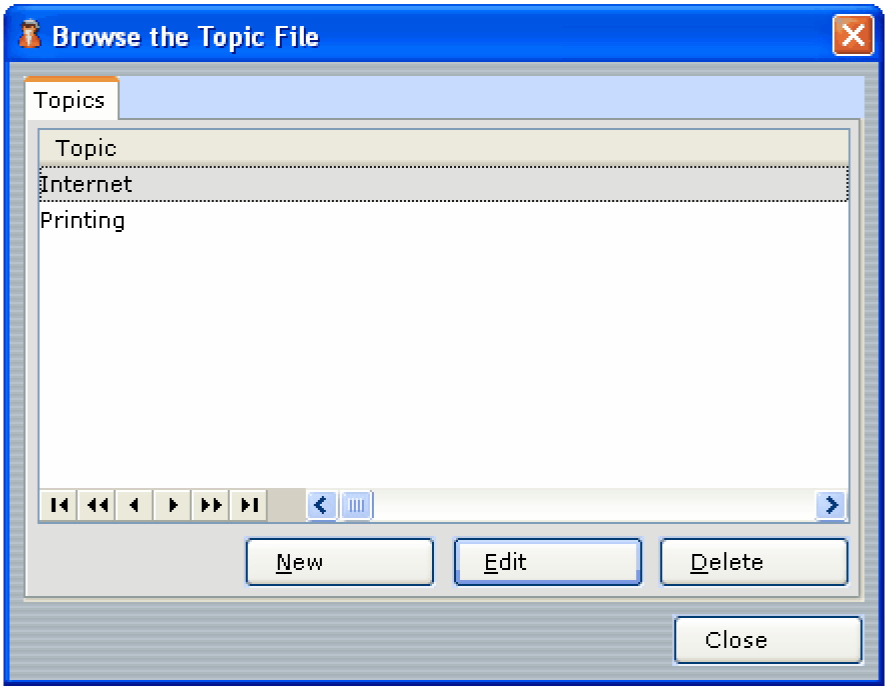
4.24 Update Peripheral Types

This screen is used to update peripheral types.



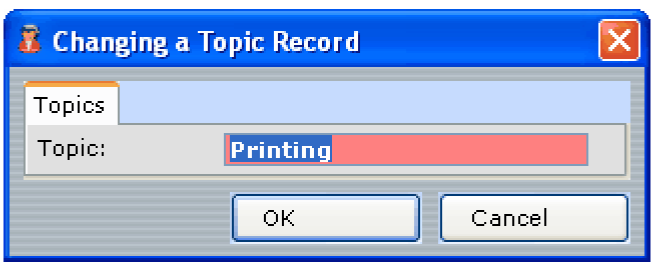
4.25 Browse Topics

Browse the Topic File



4.26 Update Topic

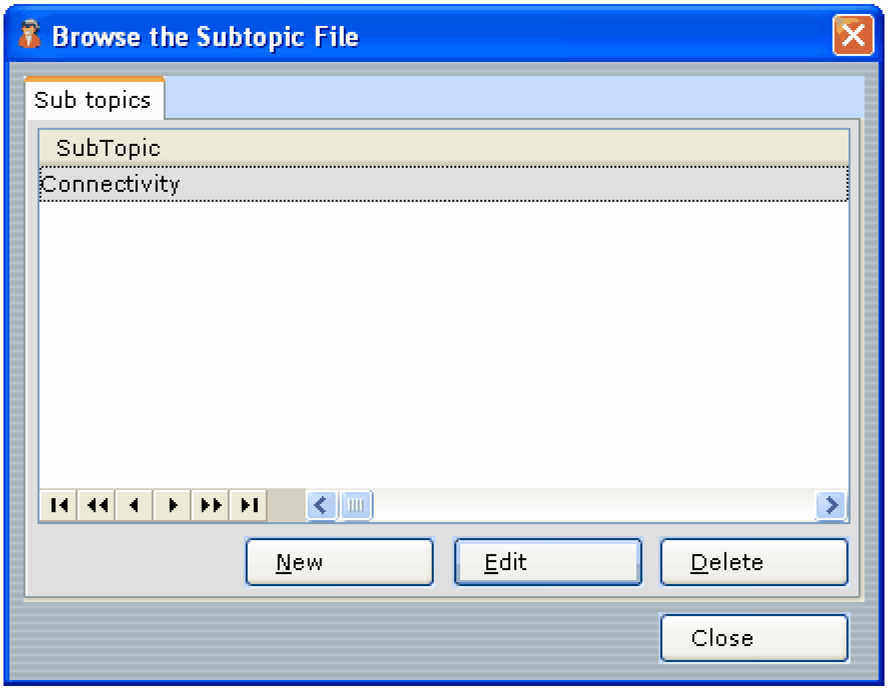
Update the Topic File



This screen is used to add or change a knowledge base topic.

4.27 Browse Subtopics

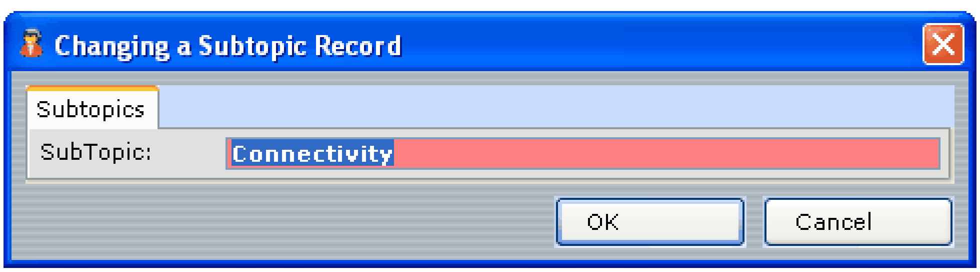
Browse the Subtopic File



This shows the lookup table SubTopics use for the Knowledge Base Table.

4.28 Update Subtopic

Update the Subtopic File

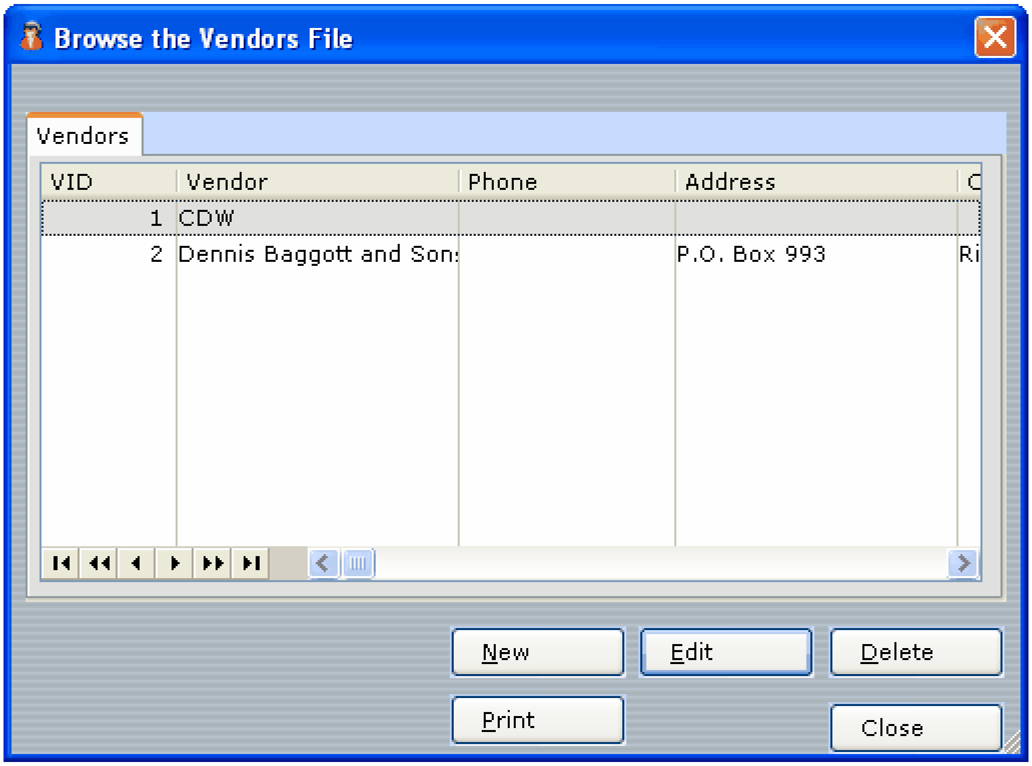


This screen is used to add or change a knowledge base sub-topic.

4.29 Browse Vendors

Browse the Vendors File

This screen is used to view Vendor information. It shows Vendor information in rows and columns like a spreadsheet.

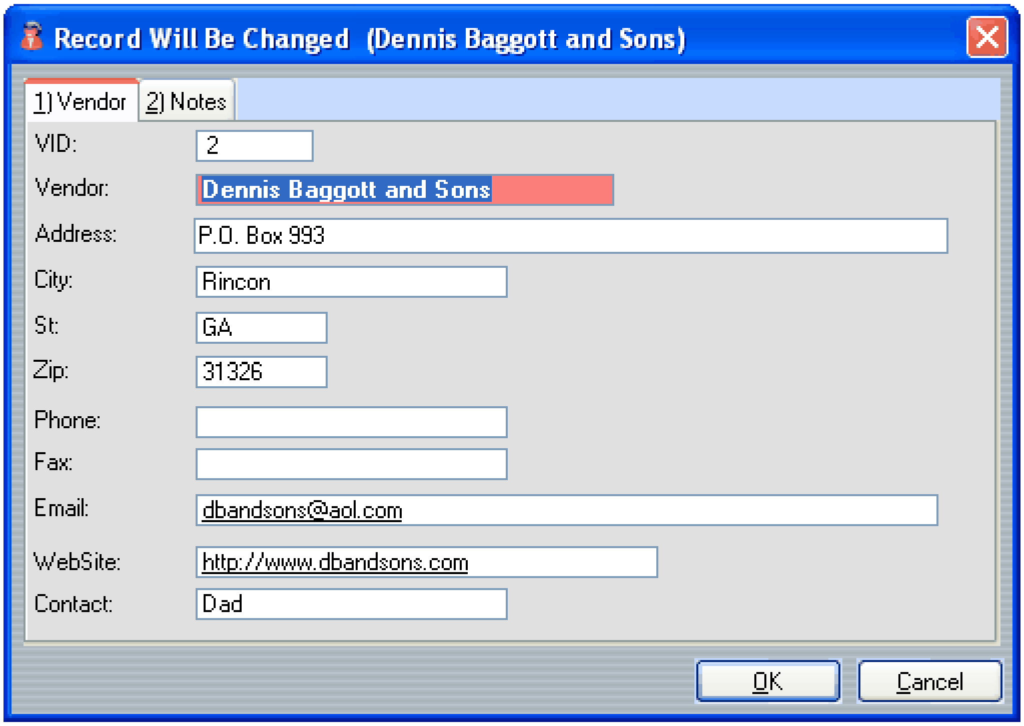


Buttons at the bottom of this screen let you Add a new record, Change the selected record, or Delete the selected record.

4.30 Update Vendors

Update the Vendors File

This screen is used to update vendor information.



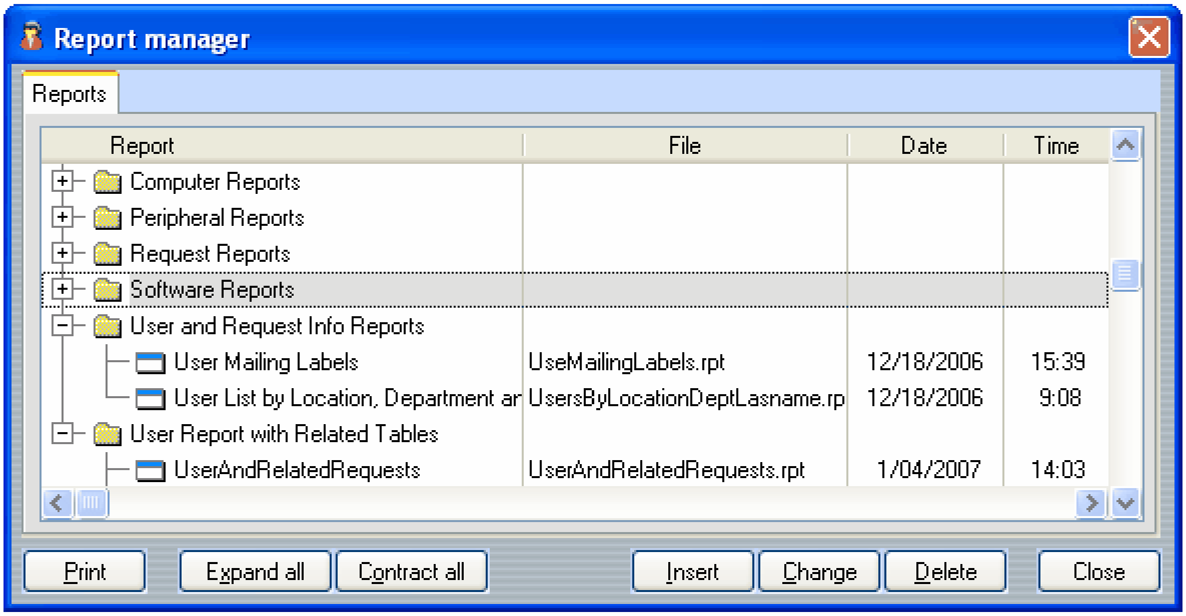
5 Reports

5.1 Reports

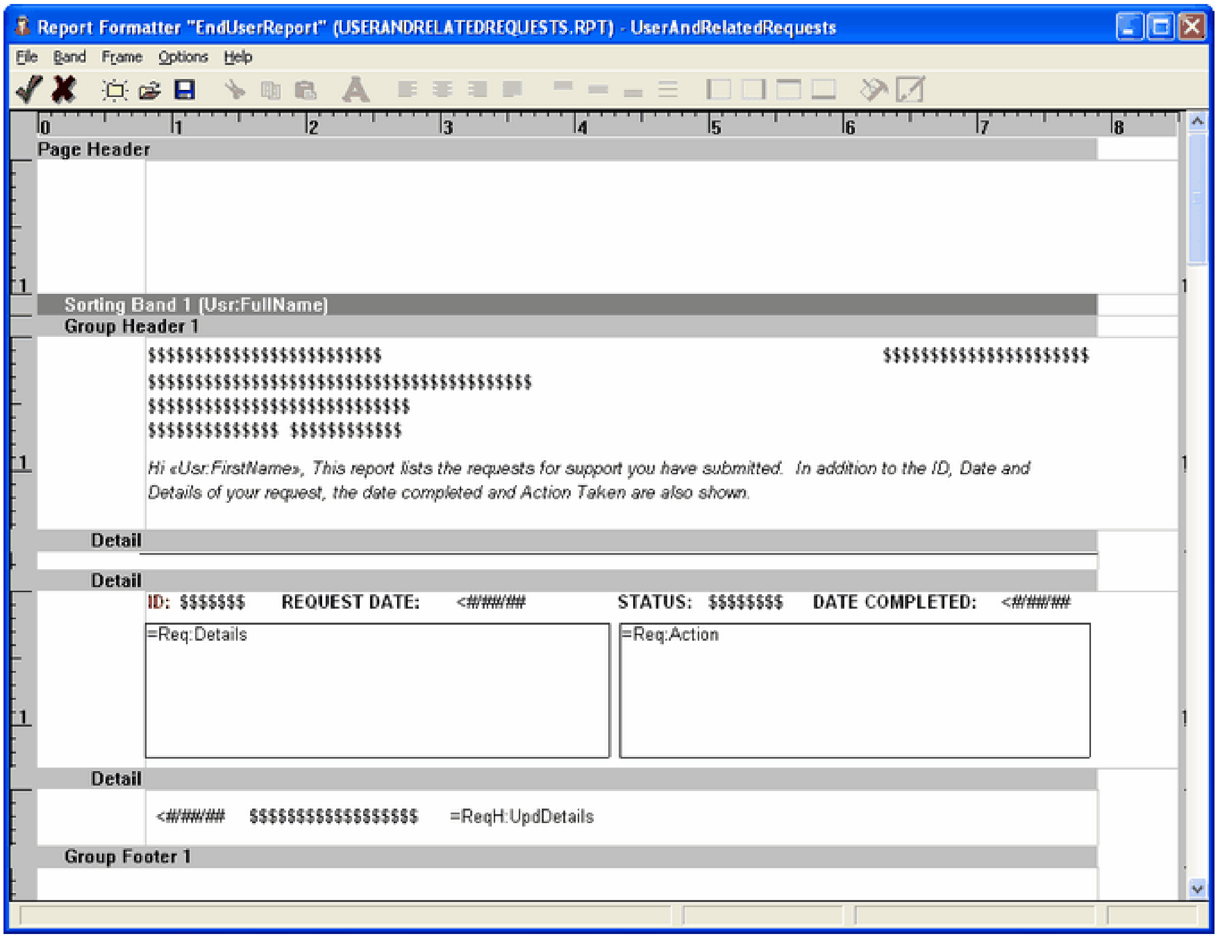
Reports

I have provided a variety of what I call standard reports. These reports can be exported to PDF files, but they have the advantage over the provided Crystal Reports in that they can be filtered using the same Query Wizard that is used for the main files browse screens and the spread sheet wizards. In addition, a custom report wizard allows you to create simple list style reports which can also be filtered using the Query Wizard. I think you will find the report wizard helpful.

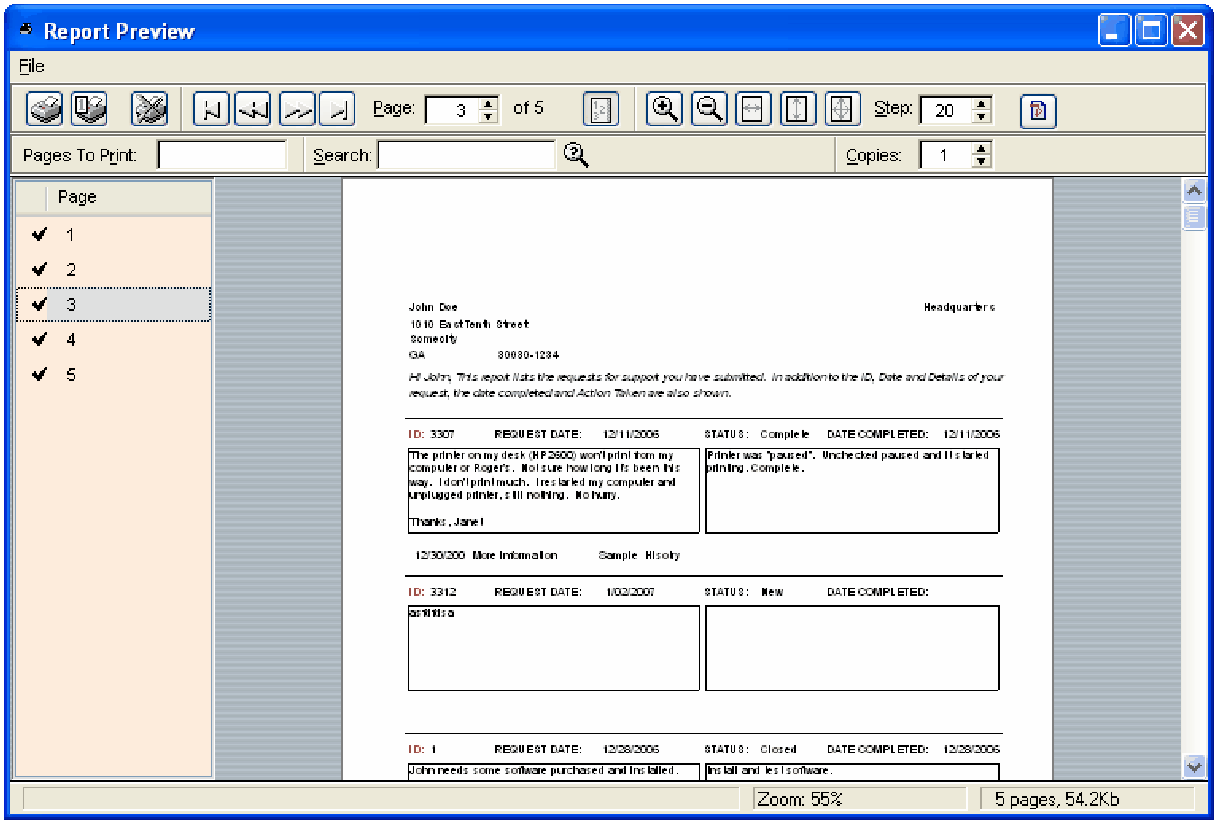
In this version I have included a more powerful Report Builder. A separate help file is provided for this feature, however, I will provide an overview of the Report Builder here. The Report Builder lets you create complex reports and use a mix of fonts, colors, etc in ways not possible with the Report Wizard. When you launch the Report Builder you will see a collapsible tree view of reports like below. You can expand branches of the tree by clicking the + sign or click the button to Expand All. To print one of the existing reports select it and click the Print button. As with the standard reports you will have the option to filter the report with the Query Wizard and can Preview the Report before printing. The Insert button will present you with an empty report based on the Table for the selected Branch of the tree. You can then add Bands and Frames and set the properties of these frames to display text or field values. You may want to start by choosing an existing report and then using the save as option to work with a copy of the report. The reports created are saved in the same database as the other database tables. This is especially useful when multiple users are accessing the same database since any created reports are then available to other staff. When you have a report open, you can Export the report saving it to a folder outside the database. The Import option is useful, for example, if you asked me to help you create a report. I can create a report then email it back to you as an attachment. Note: Do not try and import any of the provided Crystal Reports - they have the same file extension but are not used by the Report Builder.



The screen shot below show a complicated report open in the report formatter. This example shows many features of the Report Builder including the use of a Mail Merge field.



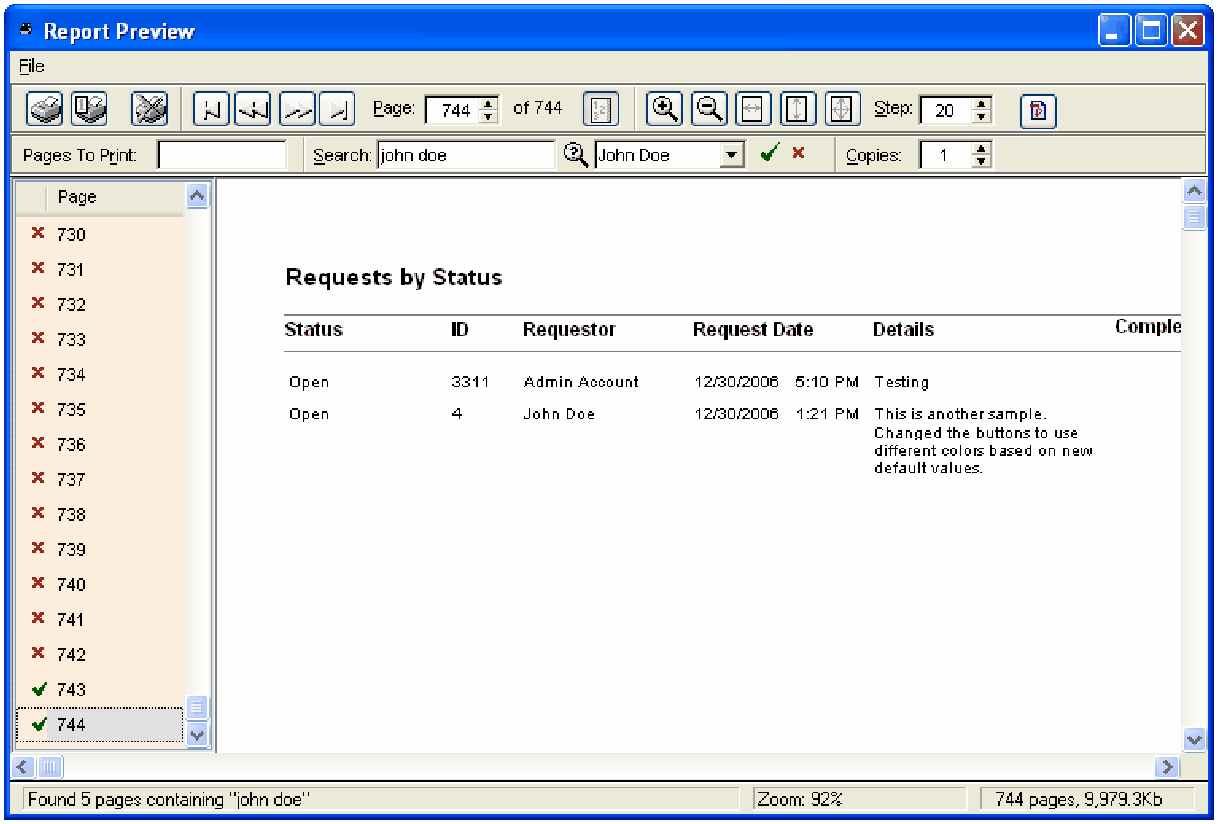
The next screen shot shows the above created report in preview mode with data.



I have included a separate help file for the Report Builder and hope you will find it useful.

5.2 StdReportPreview

This is the screen you will see when you select a standard or report wizarded report. You can change the Zoom making the preview larger or smaller, Search for text in a report, then Tag pages for printing, or Export the report to a PDF file.



5.3 Crystal Reports

Crystal Reports

In addition to the "standard" reports, and the report and spreadsheet wizards, I have included a variety of reports designed in Crystal Reports 9.0 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 9.0 you will be able to modify the provided reports or if you have created your own reports using the AAPRO2006 DSN you will be able to open them from with the program. When you launch one of these reports you may be prompted to enter a range of dates to include for the report.

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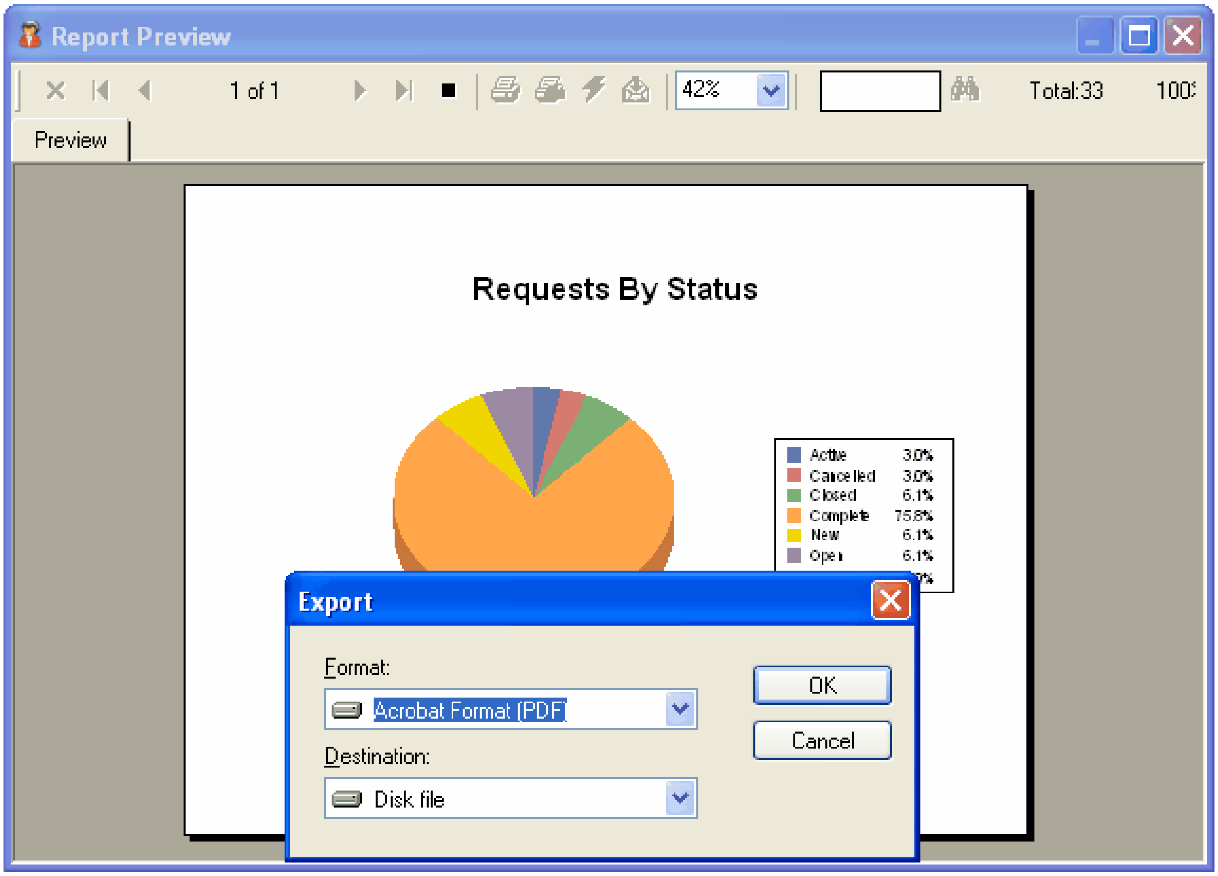
When previewing a report you will be able to use buttons at the top of the Report Preview window to navigate through the pages of a multi page report, click the Printer button to print the report or the print setup button to select your printer or modify settings, such as Landscape vs. Portrait style. 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 disk or launch the created file with the application registered on your PC to handle that file type.

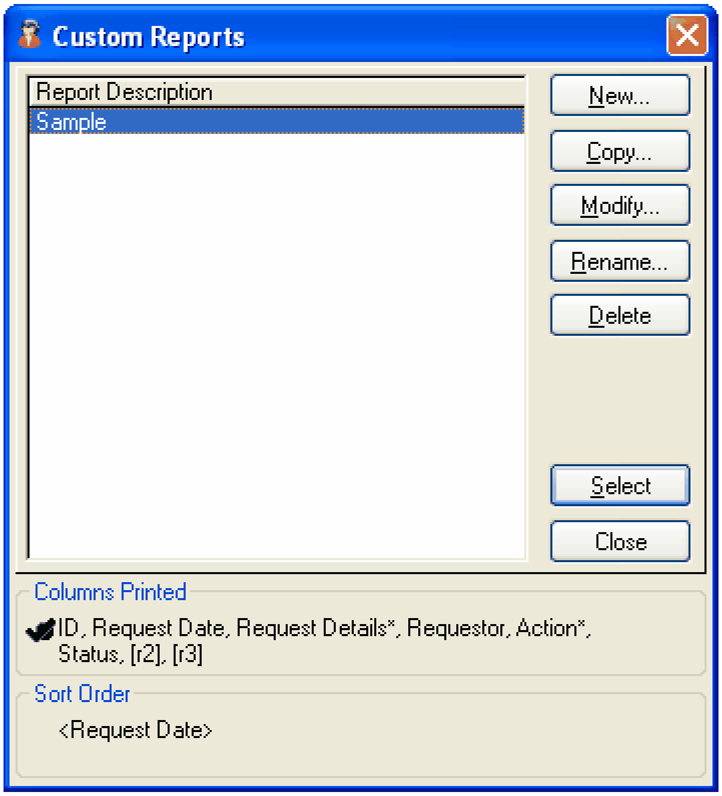


I hope you will find the provided reports useful. If you register the program and find you need a special report created, just send me an email and I may be able to create a custom report to meet your needs.

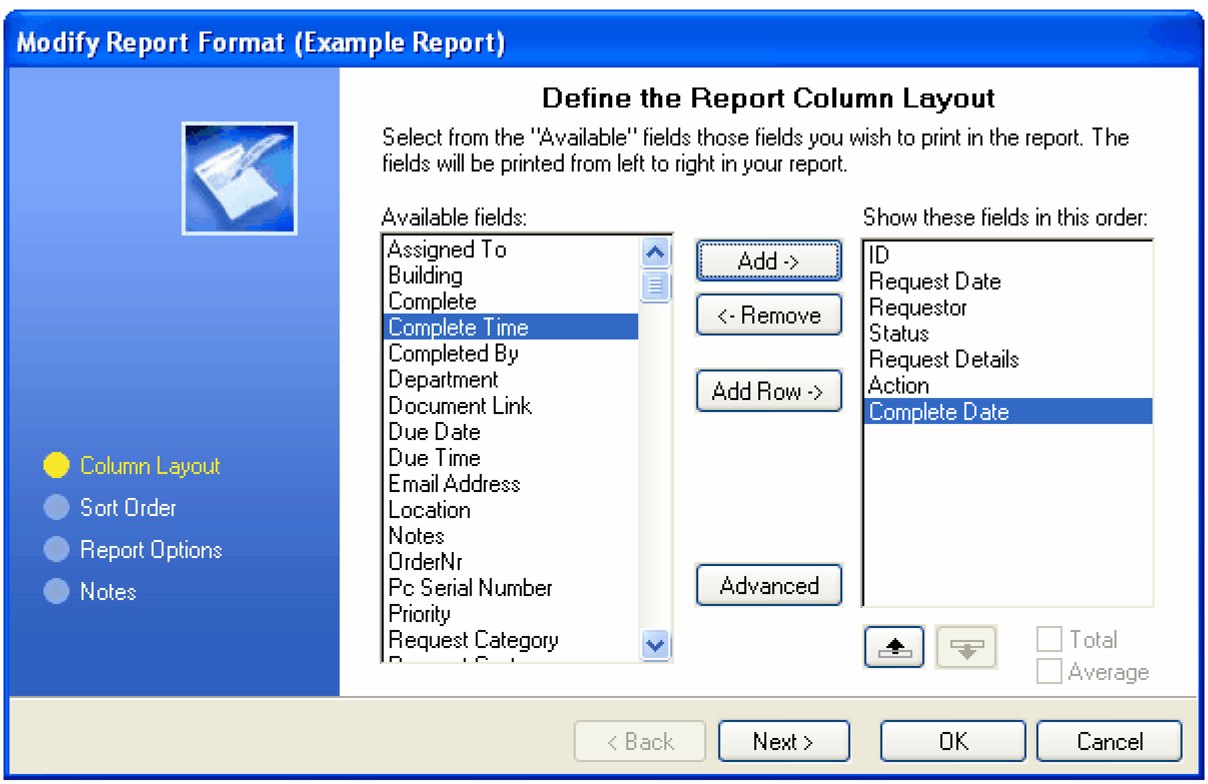
5.4 Report Wizard

This version includes much improved report wizards.

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.

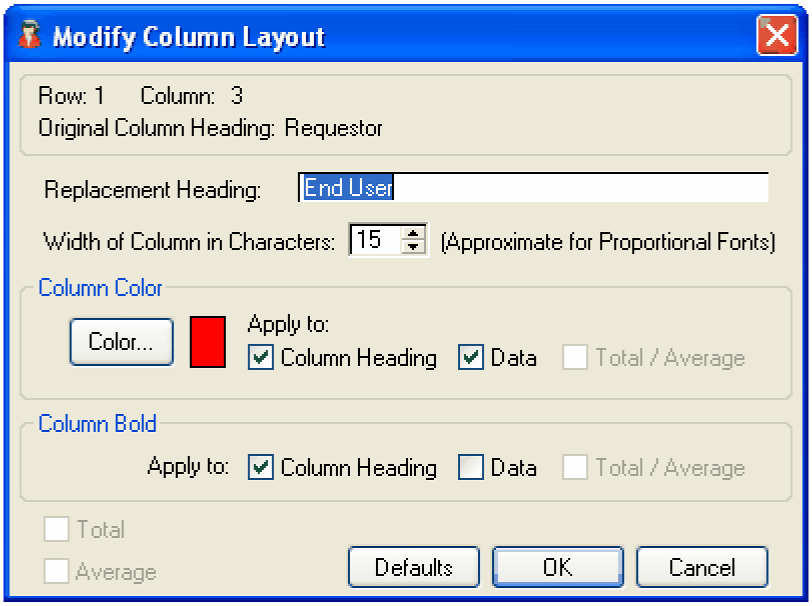


The first step is to choose the fields to be printed on the report.

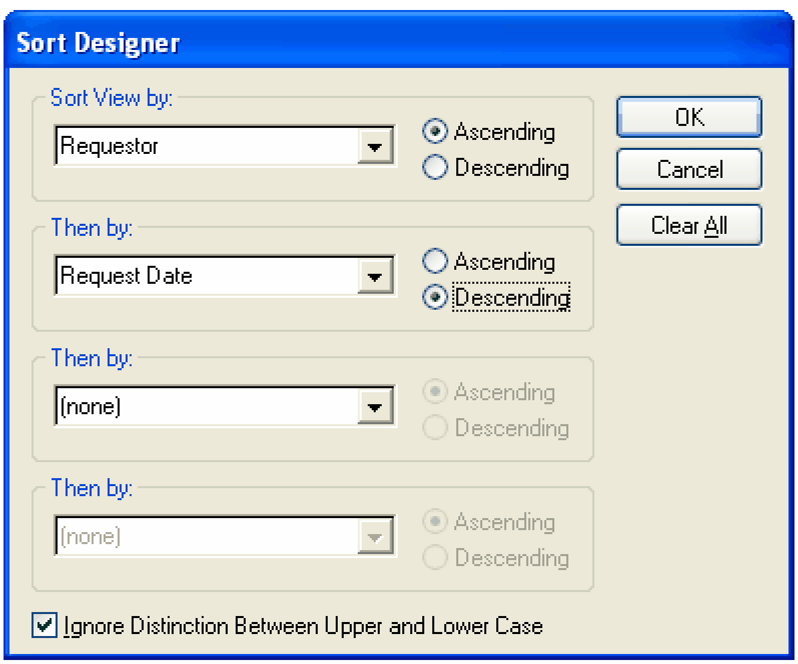


I just click on a field on the left ad click the Add button. If I have too many fields to print on a single row, even in landscape mode, I can click the Add Row button and add fields to another row. In this example one row is enough.

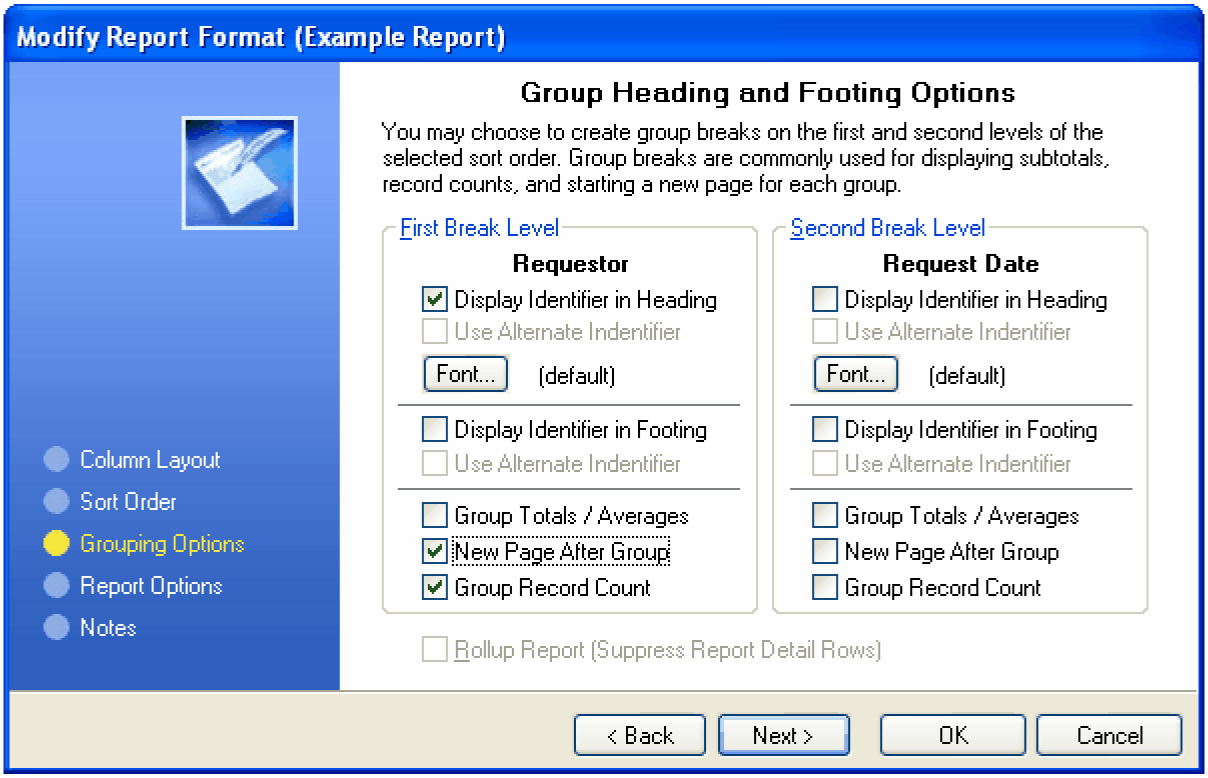
You could also specify a column width. You can change font for a column heading as well as the column data. You can apply Bold to the Column Heading, Data and the Total/Average.



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.

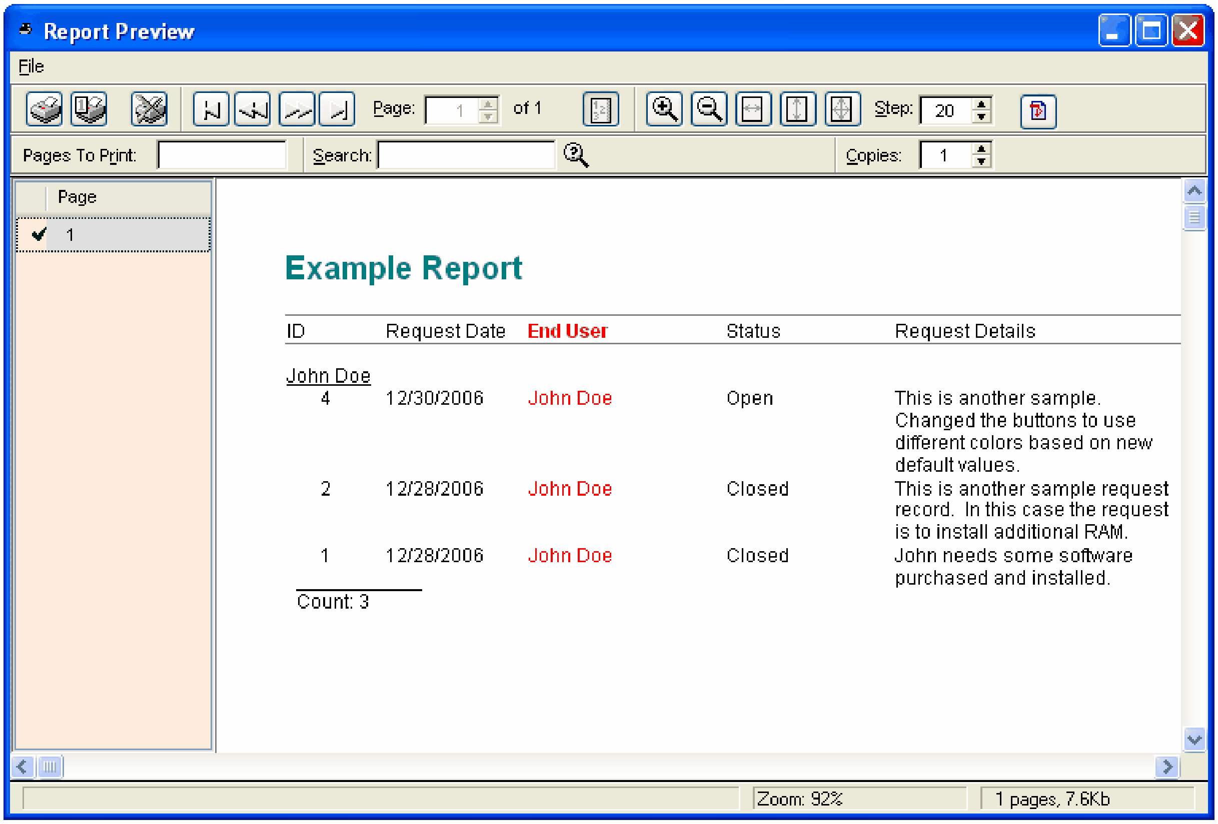


You can next set group options, such as showing totals, starting a new page after the group and more.



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.

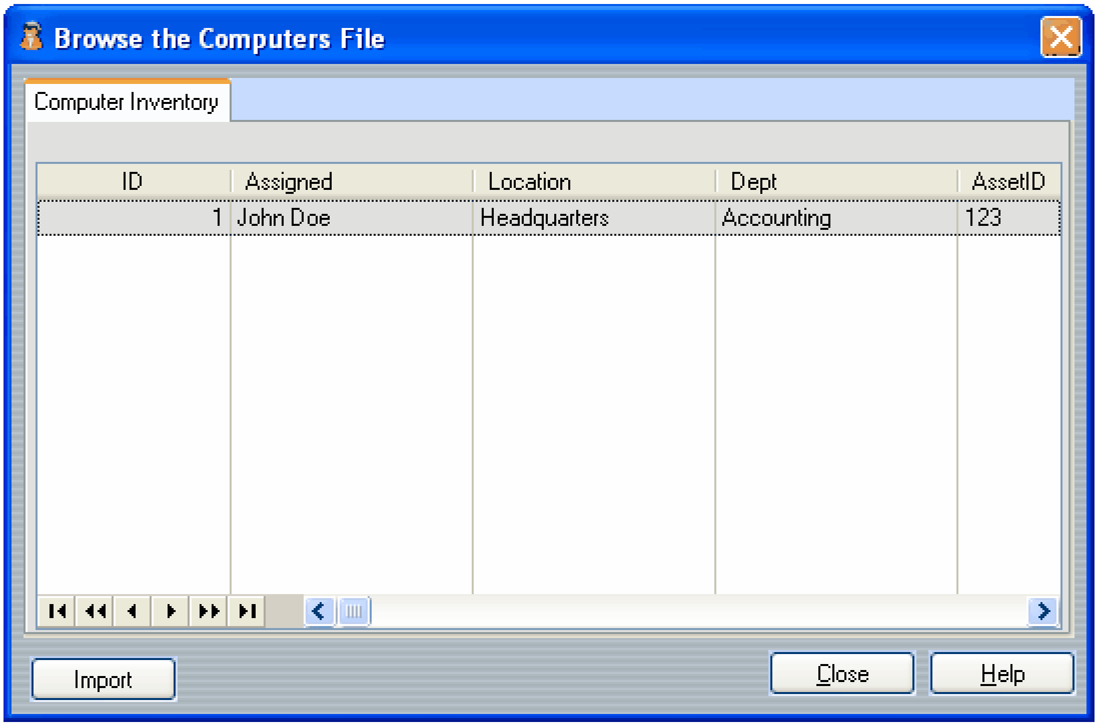


6 Utilities

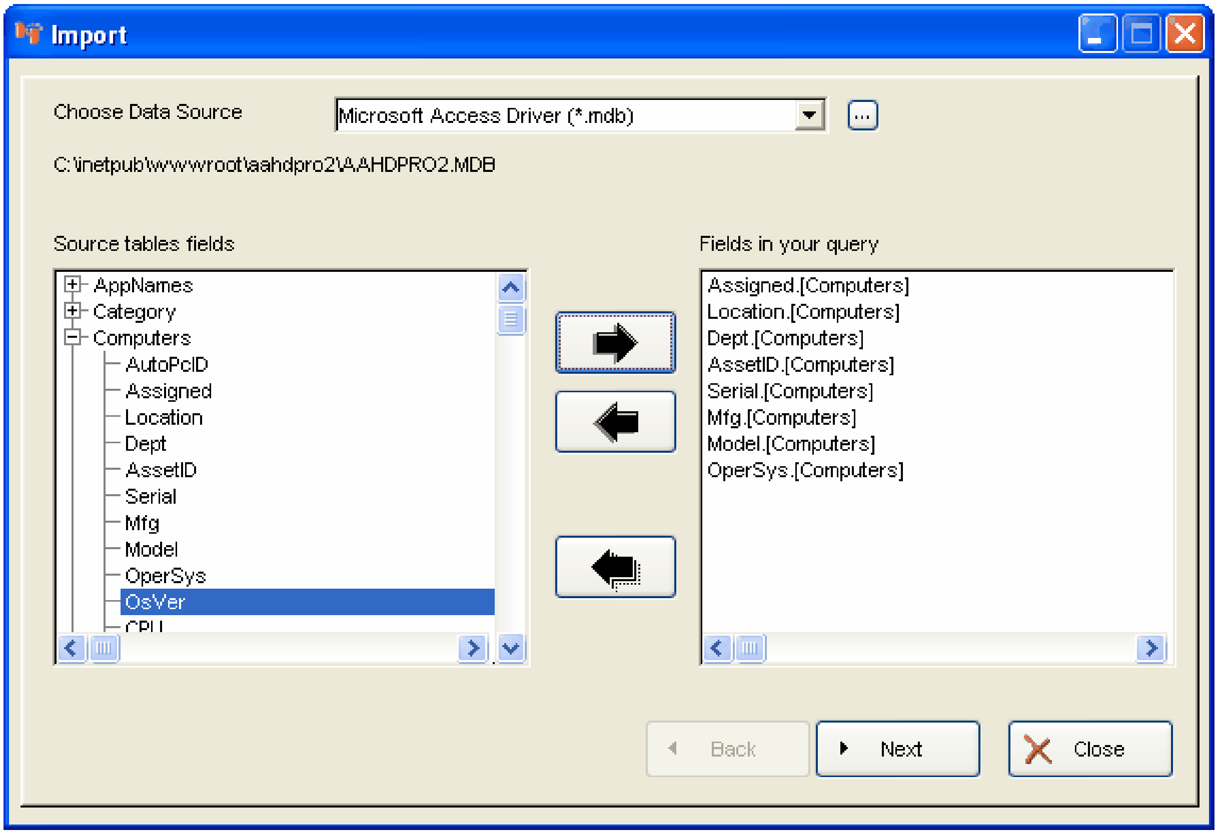
6.1 Import Computers

Import Computer Information

When you first launch the menu option to import computer inventory you will see a screen like the one below. This may be empty or may display some records you have already entered. To begin the import process click the Import button at the lower left of the screen.

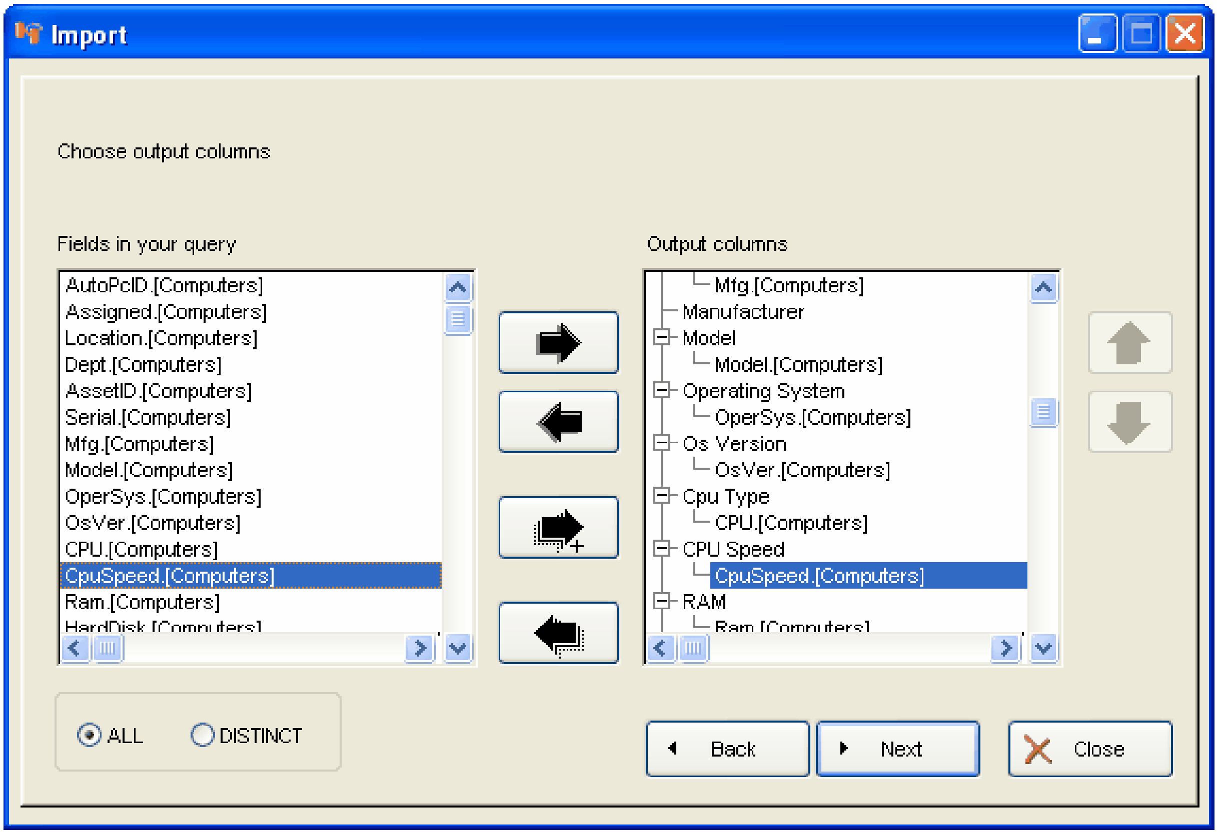


You will first need to choose the data source type from a drop down list box. The default type is Microsoft Excel, but a variety of sources may be available on your computer. I have chosen to import using the Microsoft Access Drive, and I have clicked the button with the ... to locate the .mdb file on my computer. In this case, there are many tables to choose from displayed in a tree view on the left side column. I click on the Computers branch and expand the tree to select some fields. NOTE: You do not need map a field for the PCID which will be automatically created on import. You may want to be sure you have unique values for the Asset ID and Serial Number fields.



It may be easier to select the branch level, in this case Computers, and click the arrow to move all columns to the right side. I can later match only the fields I want to import.

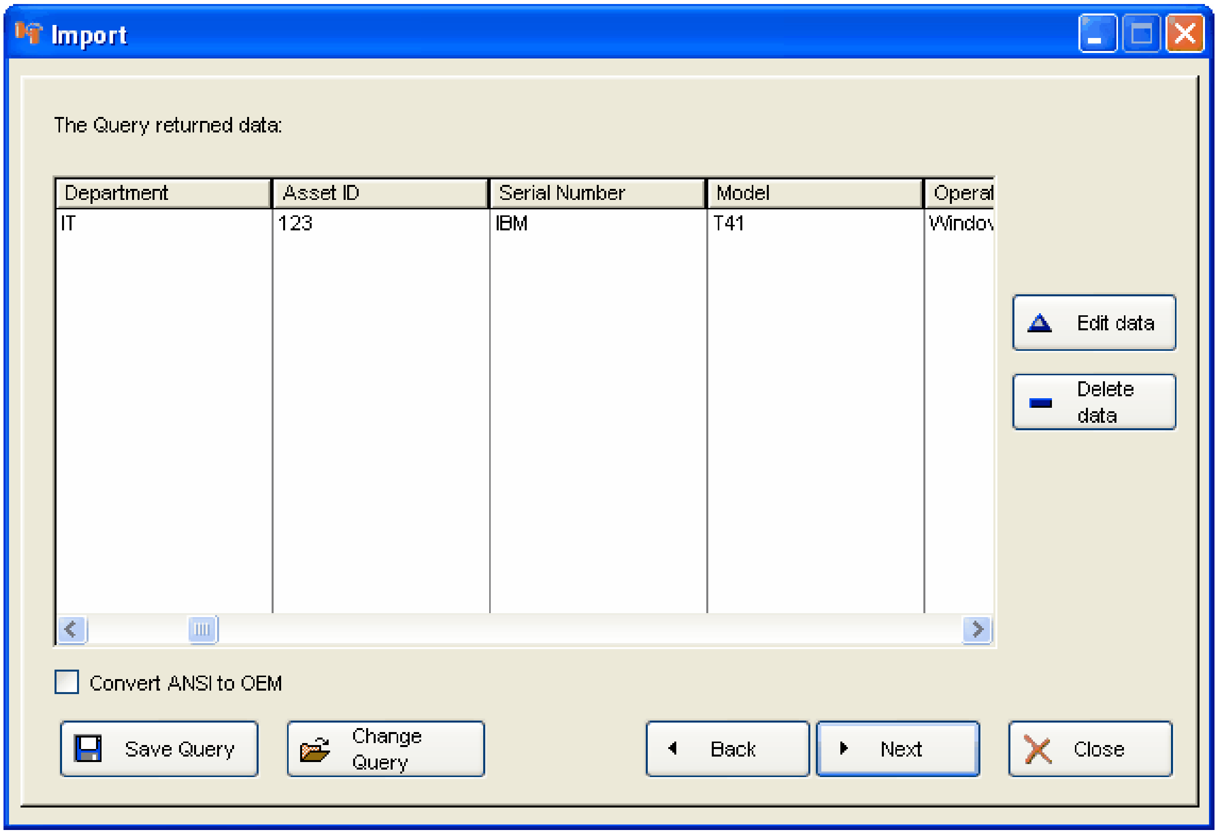
Here, I have clicked the button with the arrow and the + sign to attempt to match fields automatically - sorry, but this will never really get all the fields mapped at once.. I then manually drag any missed fields from the left column to the right column.



On the next screen I could choose to filter data, but this is usually not needed so you would just click next to go to the next screen.

I can choose a sort order, but this is also not needed since I can sort data from within the program.

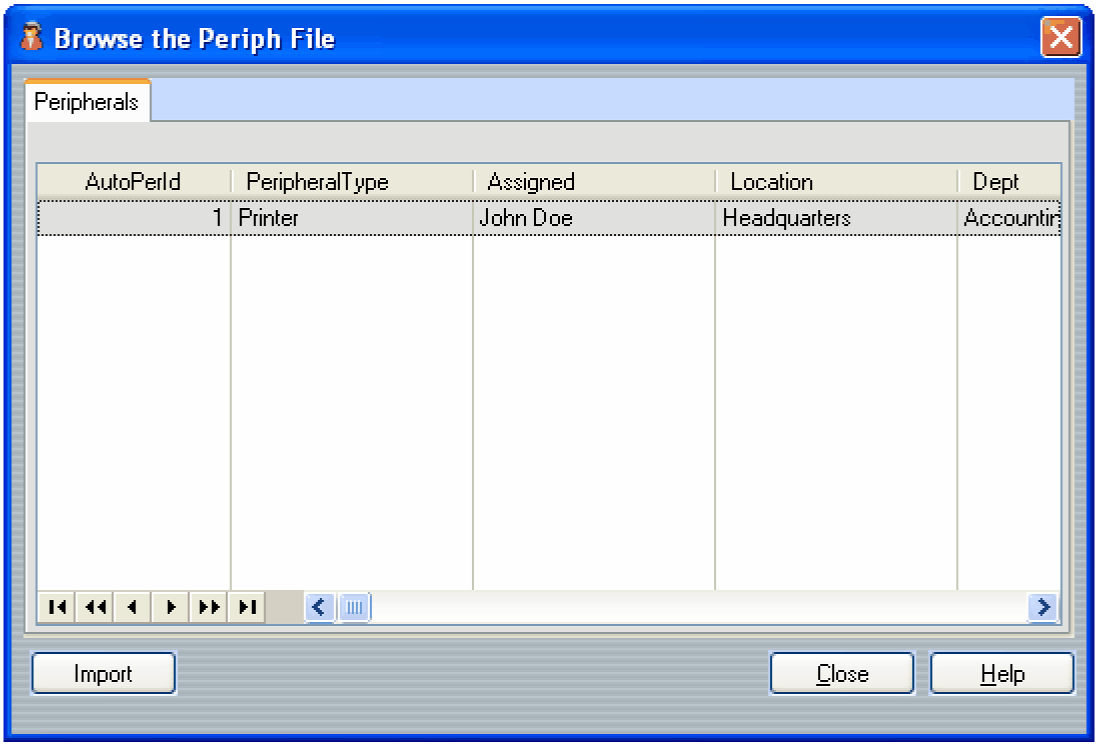
This screen shows the data found to be imported.



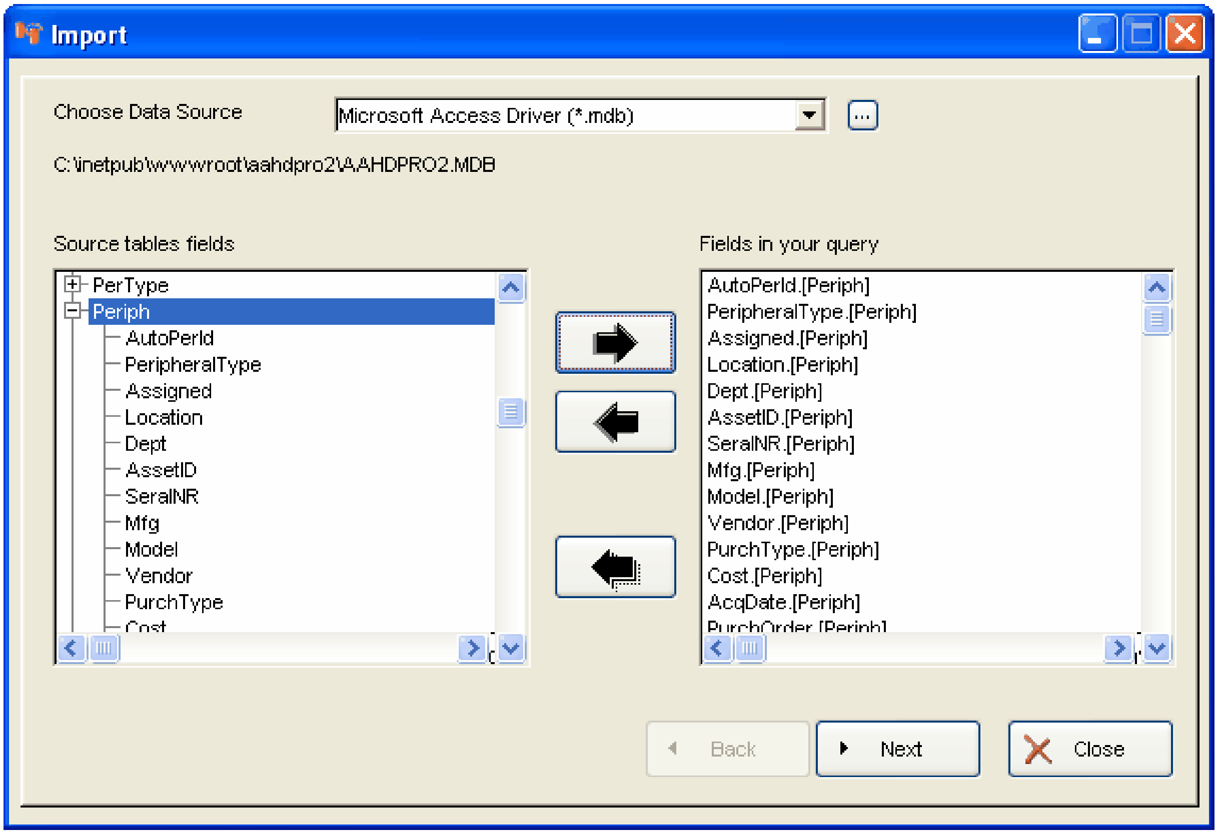
Finally, I click the Finish button to import my data. The browse screen should now show my imported data, but I can't edit the data from this screen. Just close the screen and use the other menu options to view and edit the imported data.

6.2 Import Peripherals

When you first launch the menu option to import peripheral inventory you will see a screen like the one below. This may be empty or may display some records you have already entered. To begin the import process click the Import button at the lower left of the screen.

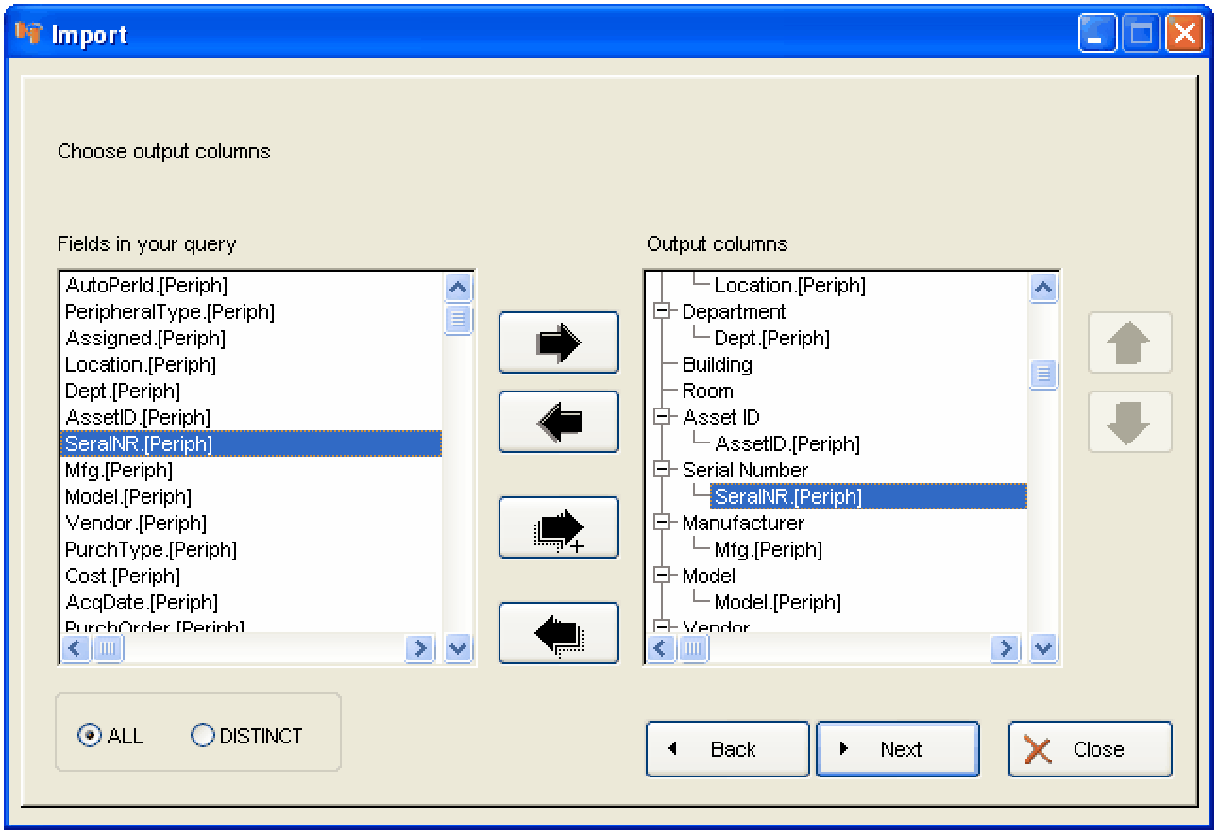


You will first need to choose the data source type from a drop down list box. The default type is Microsoft Excel, but a variety of sources may be available on your computer. I have chosen to import using the Microsoft Access Drive, and I have clicked the button with the ... to locate the .mdb file on my computer. In this case, there are many tables to choose from displayed in a tree view on the left side column. I click on the Periph branch and expand the tree to select some fields.



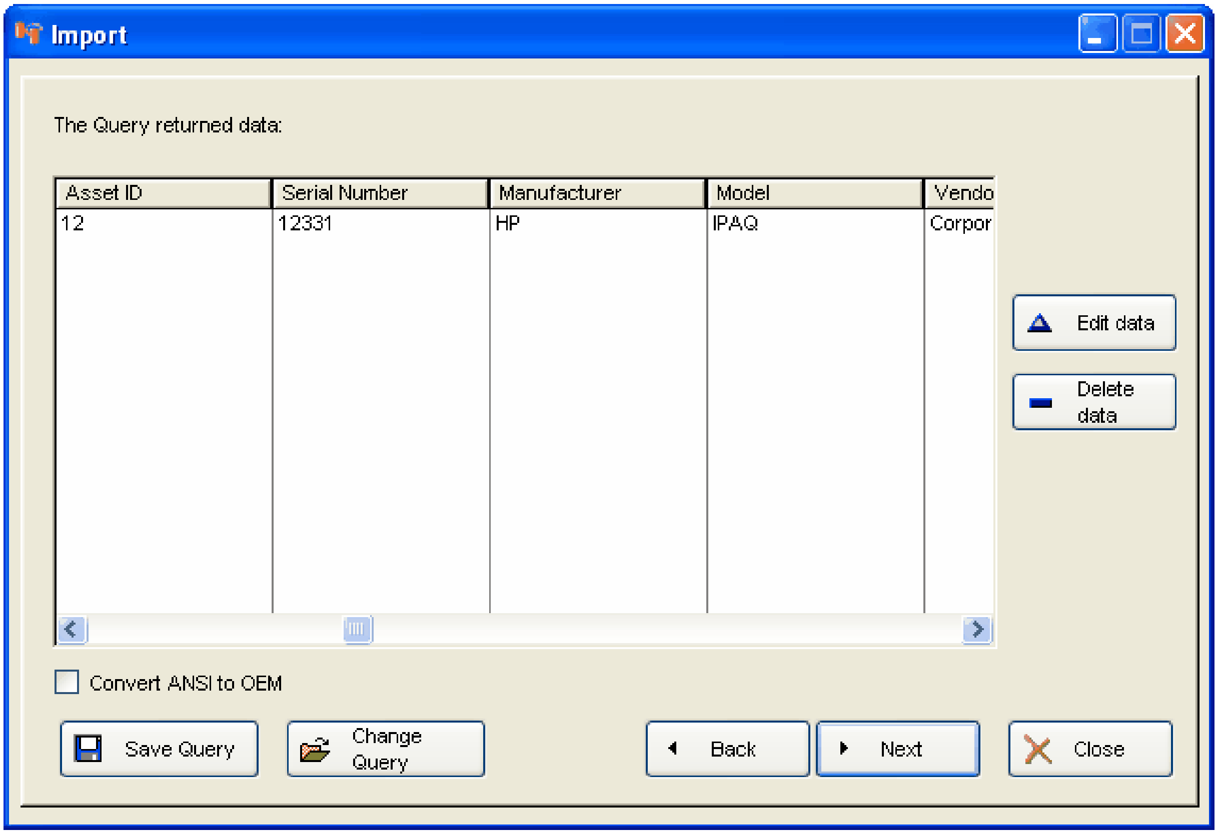
It may be easier to select the branch level, in this case Periph, and click the arrow to move all columns to the right side. I can later match only the fields I want to import.

Here, I have clicked the button with the arrow and the + sign to attempt to match fields automatically. I then manually drag any missed fields from the left column to the right column. NOTE: I did not match any field to the ID field. Generally, you will not want to assign anything to ID type fields since they are automatically numbered. You will want to be sure your Asset ID and Serial Number fields are unique for each record you are importing.



On the next screen I could choose to filter data, but this is usually not needed so you would just click next to go to the next screen.

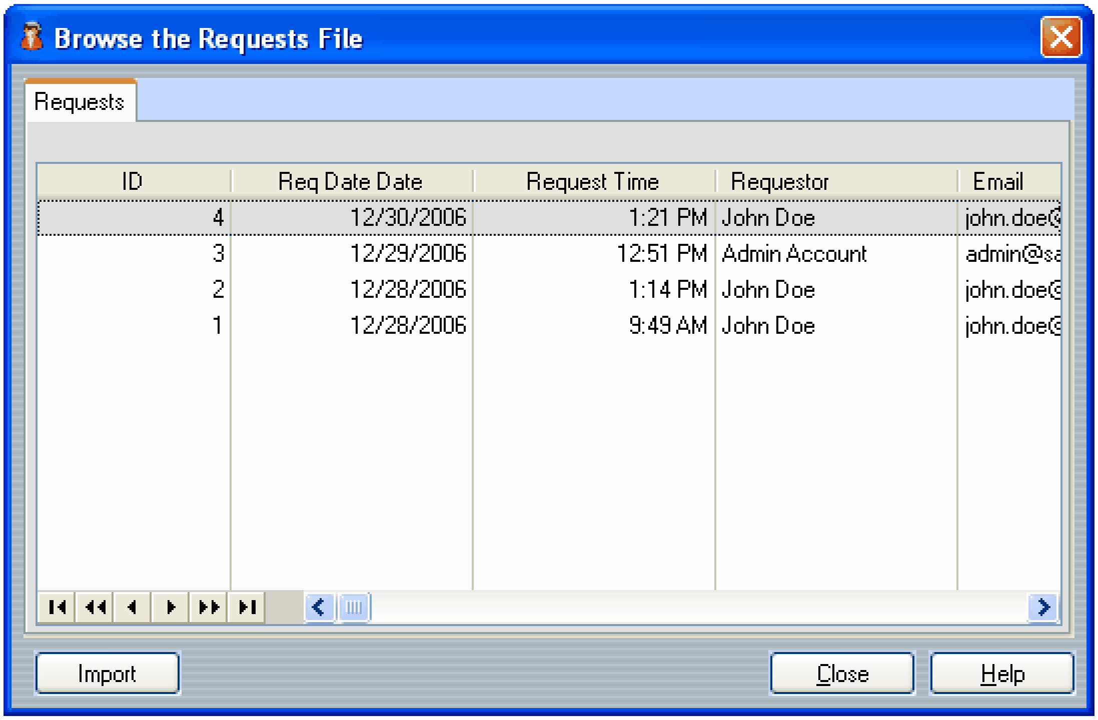
This screen shows the data found to be imported.



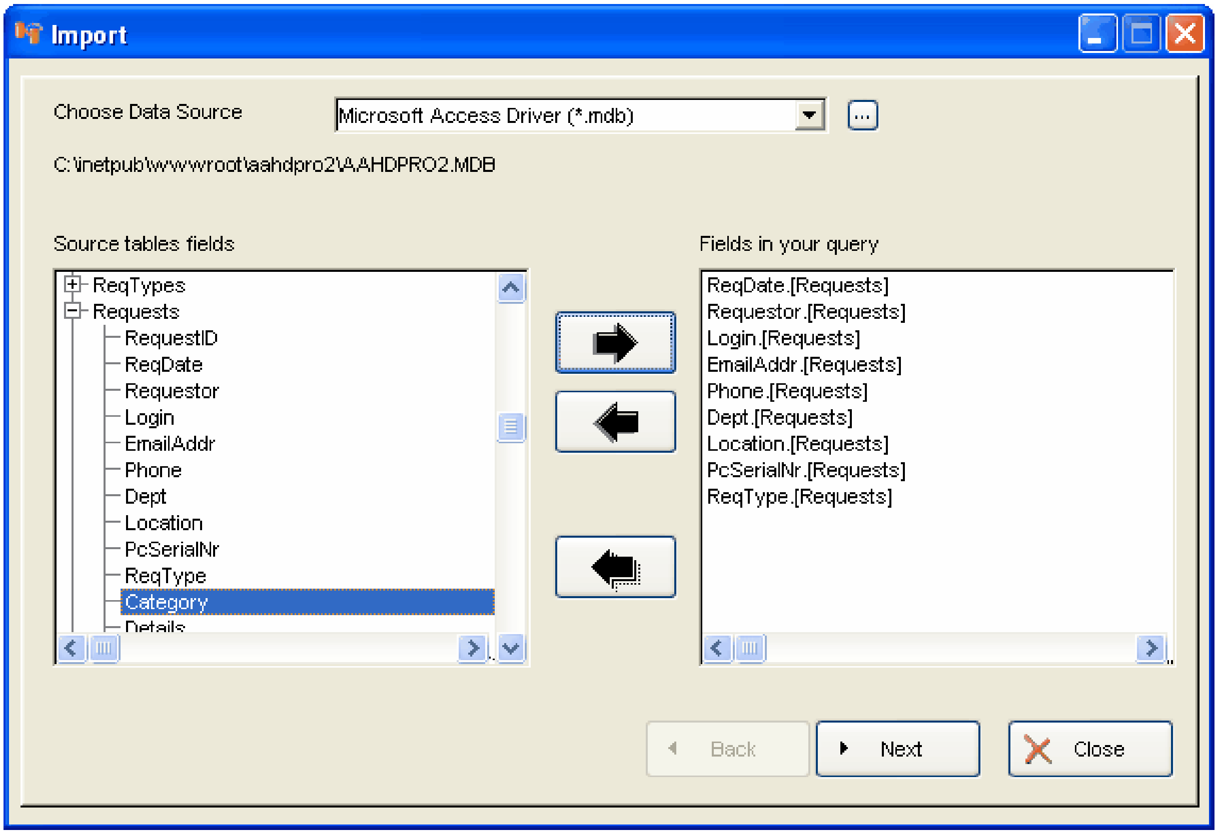
Finally, I click the Finish button to import my data. The browse screen should now show my imported data, but I can't edit the data from this screen. Just close the screen and use the other menu options to view and edit the imported data.

6.3 Import Requests

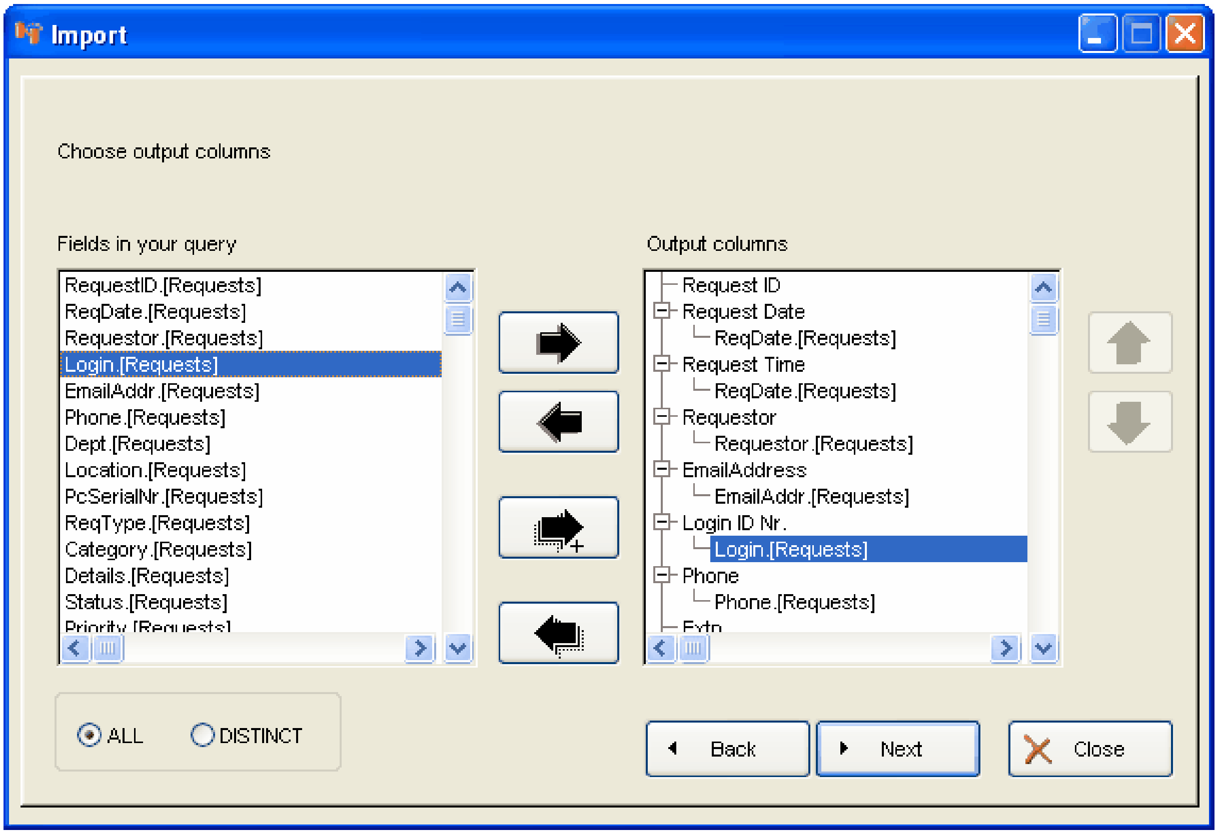
When you first launch the menu option to import requests you will see a screen like the one below. This may be empty or may display some records you have already entered. To begin the import process click the Import button at the lower left of the screen.



You will first need to choose the data source type from a drop down list box. The default type is Microsoft Excel, but a variety of sources may be available on your computer. I have chosen to import using the Microsoft Access Drive, and I have clicked the button with the ... to locate the .mdb file on my computer. In this case, there are many tables to choose from displayed in a tree view on the left side column. I click on the Requests branch and expand the tree to select some fields.



It may be easier to select the branch level, in this case Requests, and click the arrow to move all columns to the right side. I can later match only the fields I want to import.



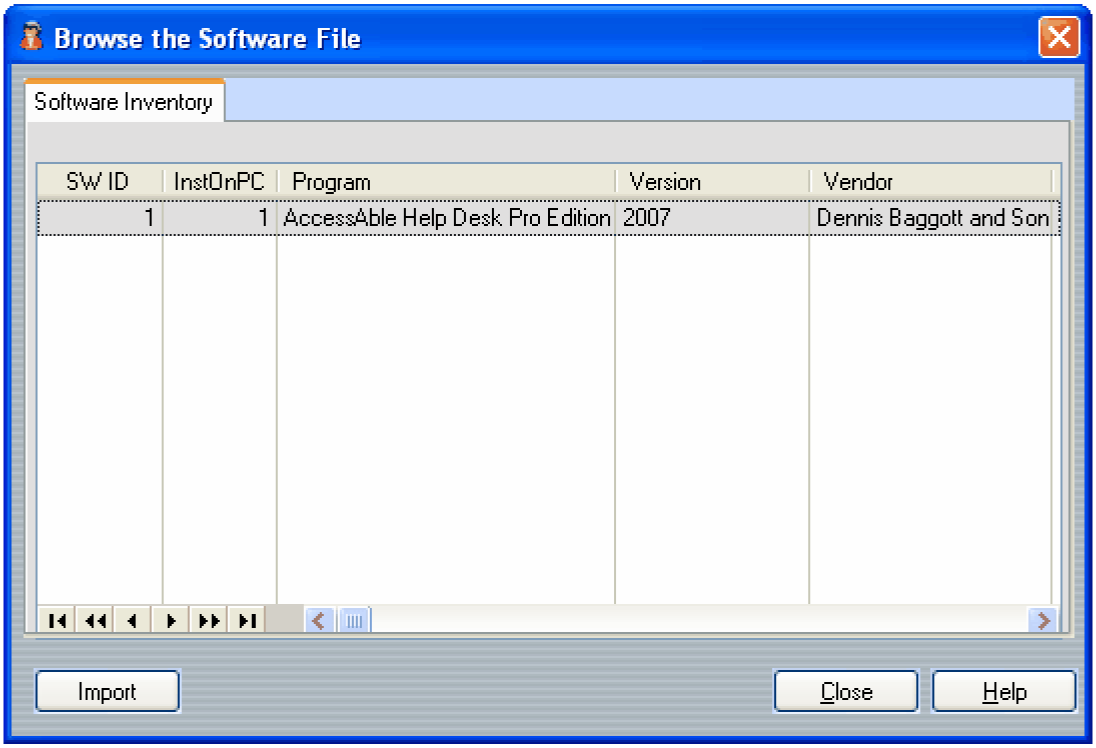
NOTE: In matching fields you will generally not want to assign the ID fields, as these are automatically numbered fields. In the case of the Requests table, there is a numeric Login ID field which related each request to the user who submitted the request. If the file you are importing does not have that field, and you can't create one before importing, you will need to edit each request to select the requesting user.

NOTE: Many files you may have to import from combine a date and time field in a single field. In this case, you would want to assign that field twice - once to a corresponding date field on the left side of the screen and again, the same field to the time field on the left side of the screen.

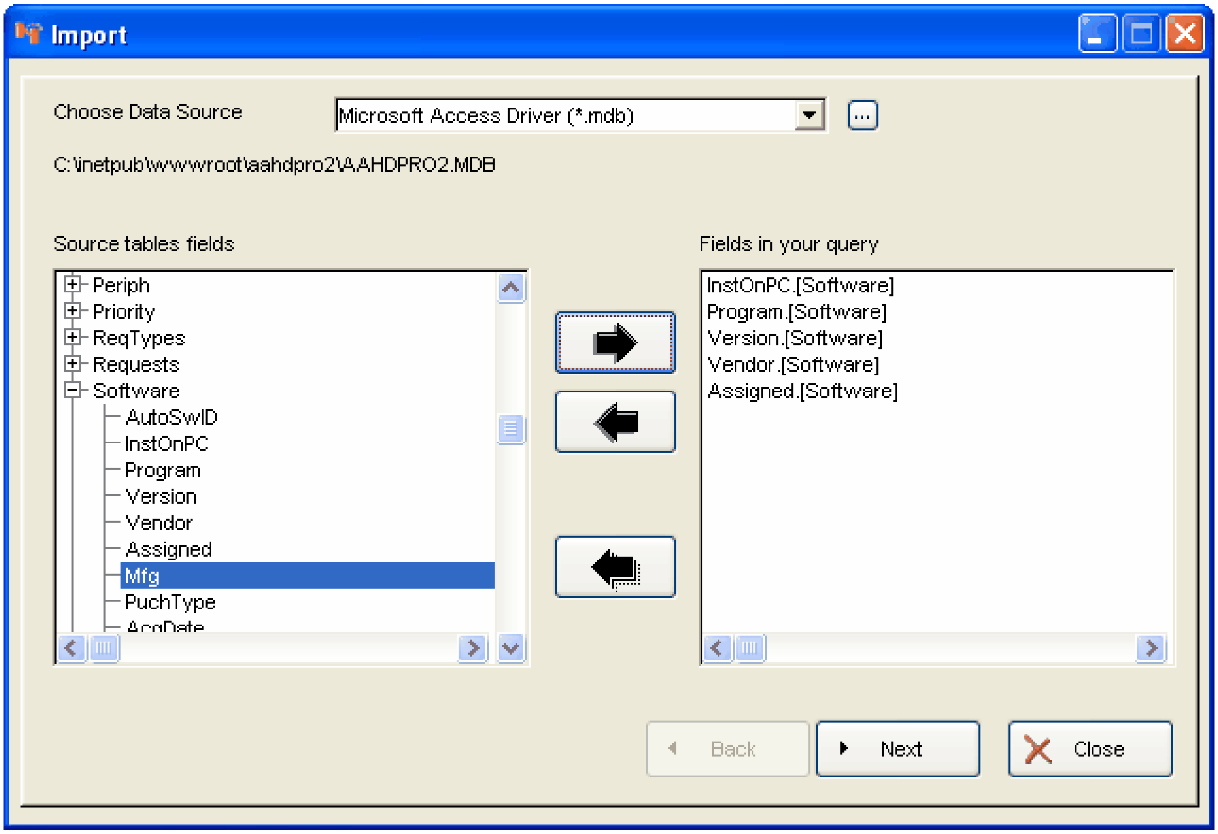
Finally, I click the Finish button to import my data. The browse screen should now show my imported data, but I can't edit the data from this screen. Just close the screen and use the other menu options to view and edit the imported data.

6.4 Import Software

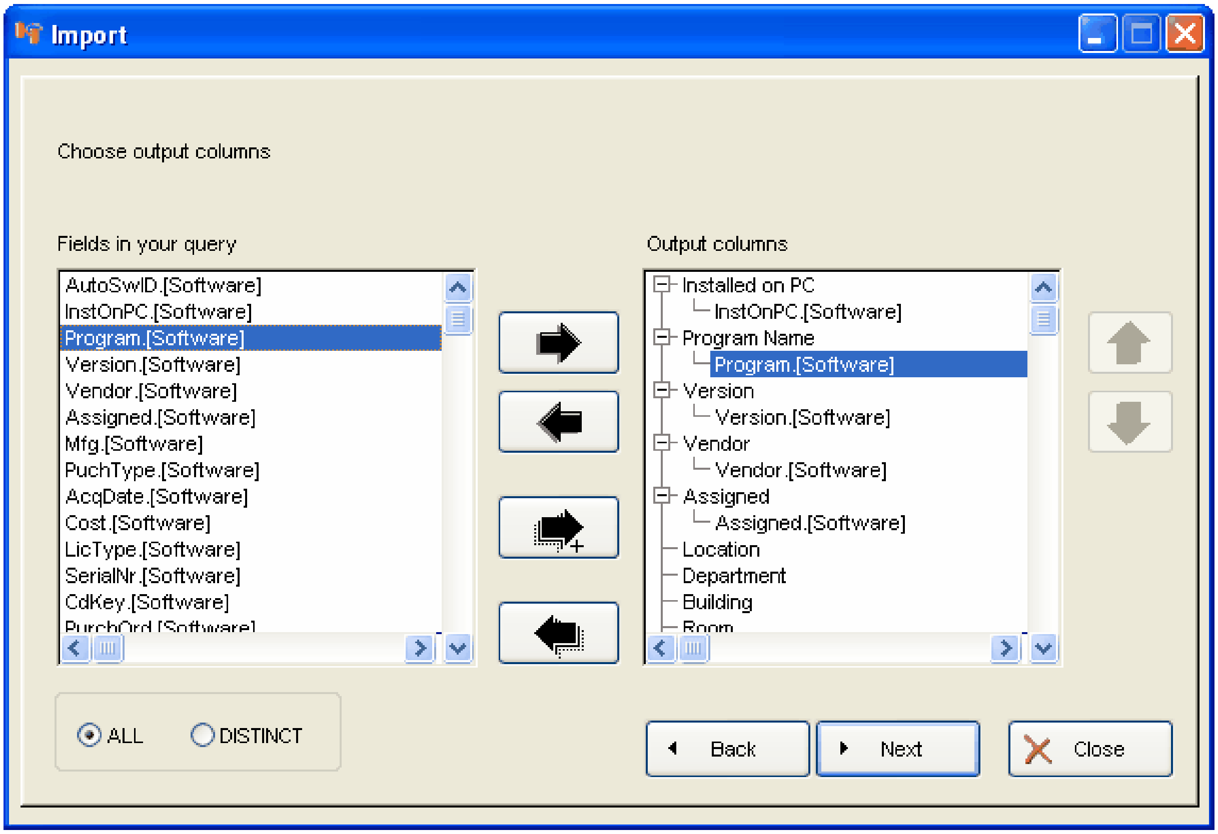
When you first launch the menu option to import software inventory you will see a screen like the one below. This may be empty or may display some records you have already entered. To begin the import process click the Import button at the lower left of the screen



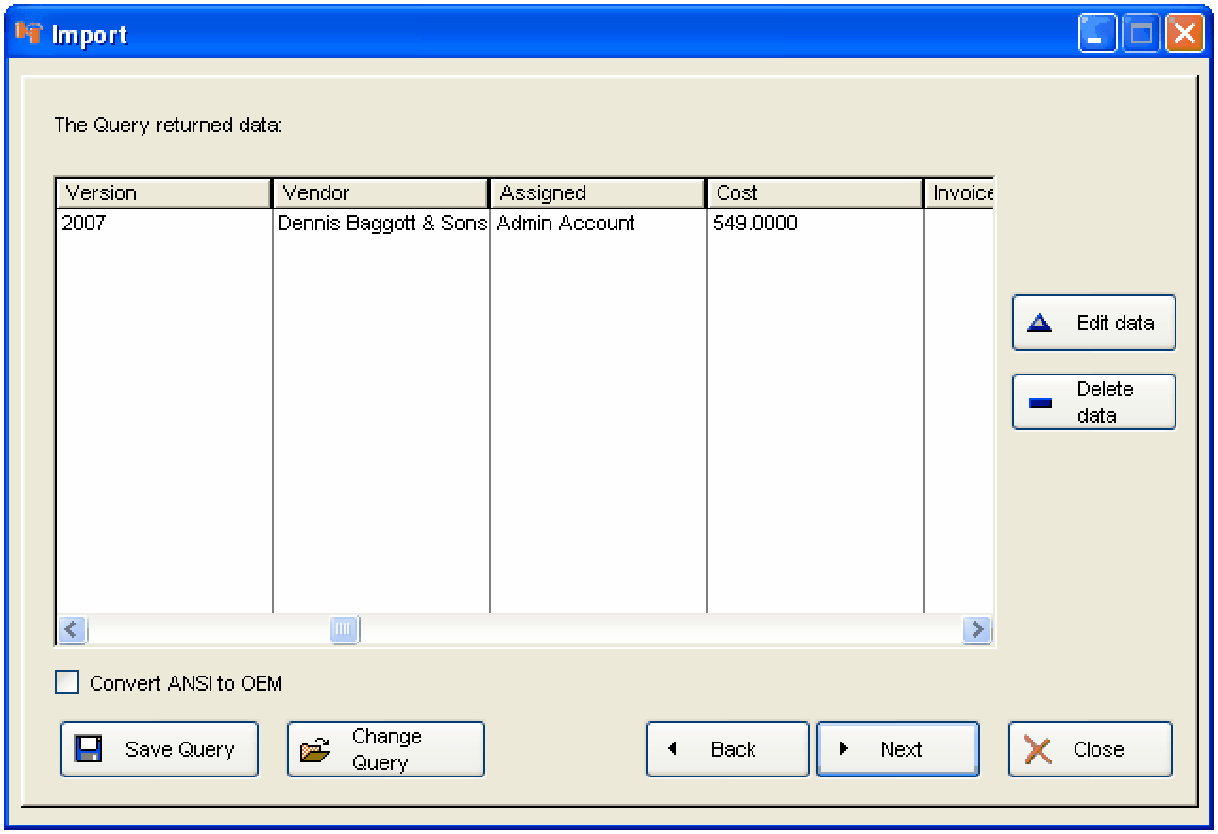
You will first need to choose the data source type from a drop down list box. The default type is Microsoft Excel, but a variety of sources may be available on your computer. I have chosen to import using the Microsoft Access Drive, and I have clicked the button with the ... to locate the .mdb file on my computer. In this case, there are many tables to choose from displayed in a tree view on the left side column. I click on the Software branch and expand the tree to select some fields.



It may be easier to select the branch level, in this case Software, and click the arrow to move all columns to the right side. I can later match only the fields I want to import.



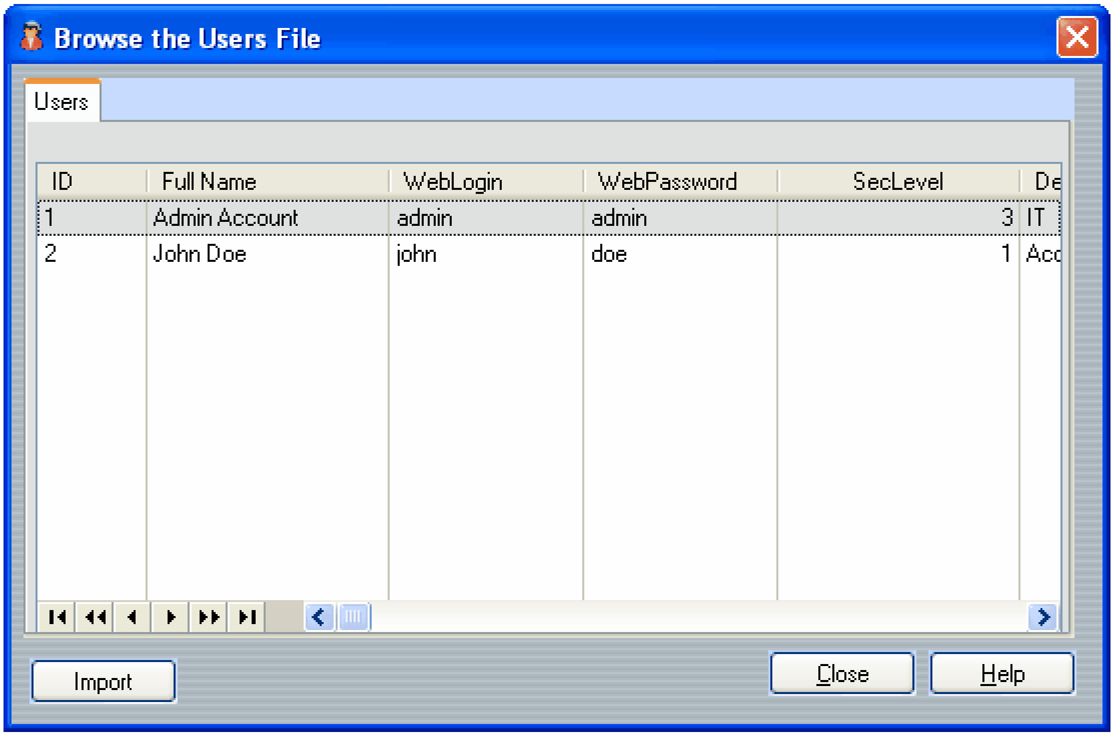
Finally, I click the Finish button to import my data.



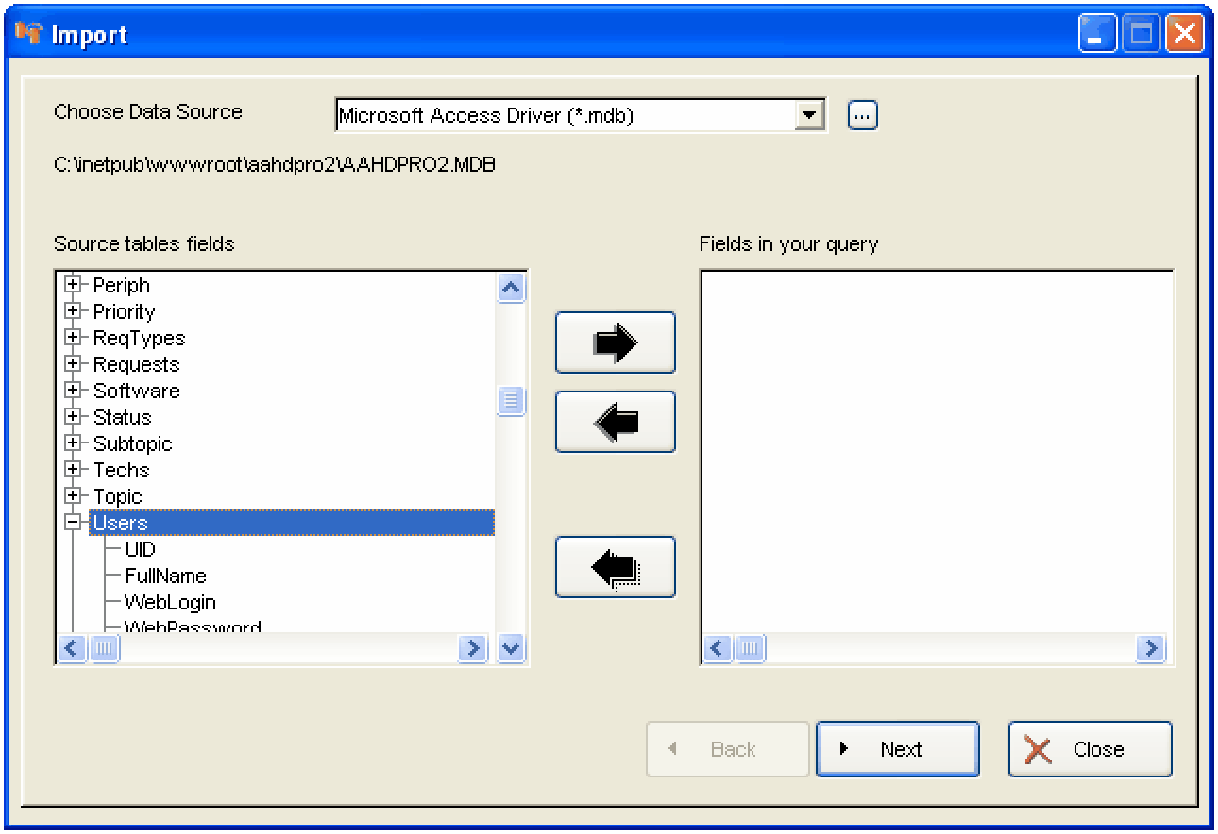
The browse screen should now show my imported data, but I can't edit the data from this screen. Just close the screen and use the other menu options to view and edit the imported data.

6.5 Import Users

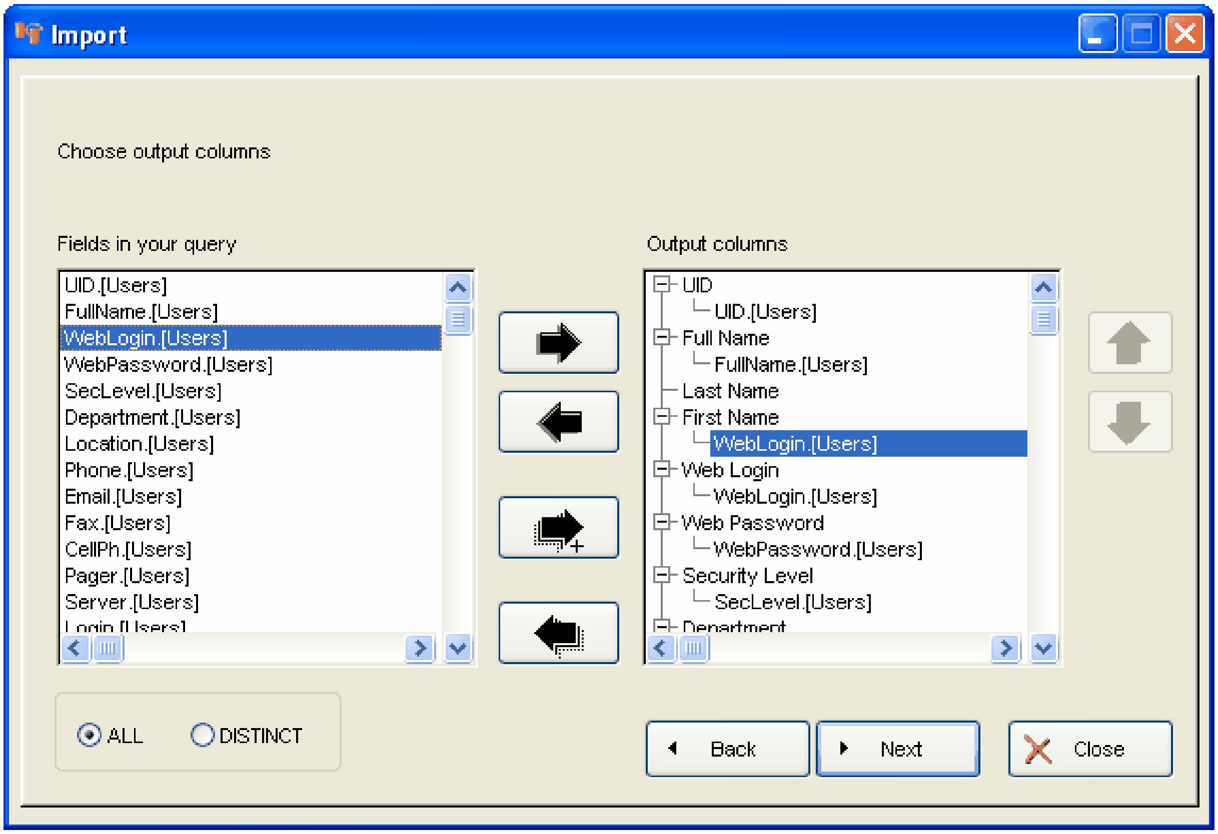
When you first launch the menu option to import user information you will see a screen like the one below. This may be empty or may display some records you have already entered. To begin the import process click the Import button at the lower left of the screen.



You will first need to choose the data source type from a drop down list box. The default type is Microsoft Excel, but a variety of sources may be available on your computer. I have chosen to import using the Microsoft Access Driver, and I have clicked the button with the ... to locate the .mdb file on my computer. In this case, there are many tables to choose from displayed in a tree view on the left side column. I click on the Users branch and expand the tree to select some fields.



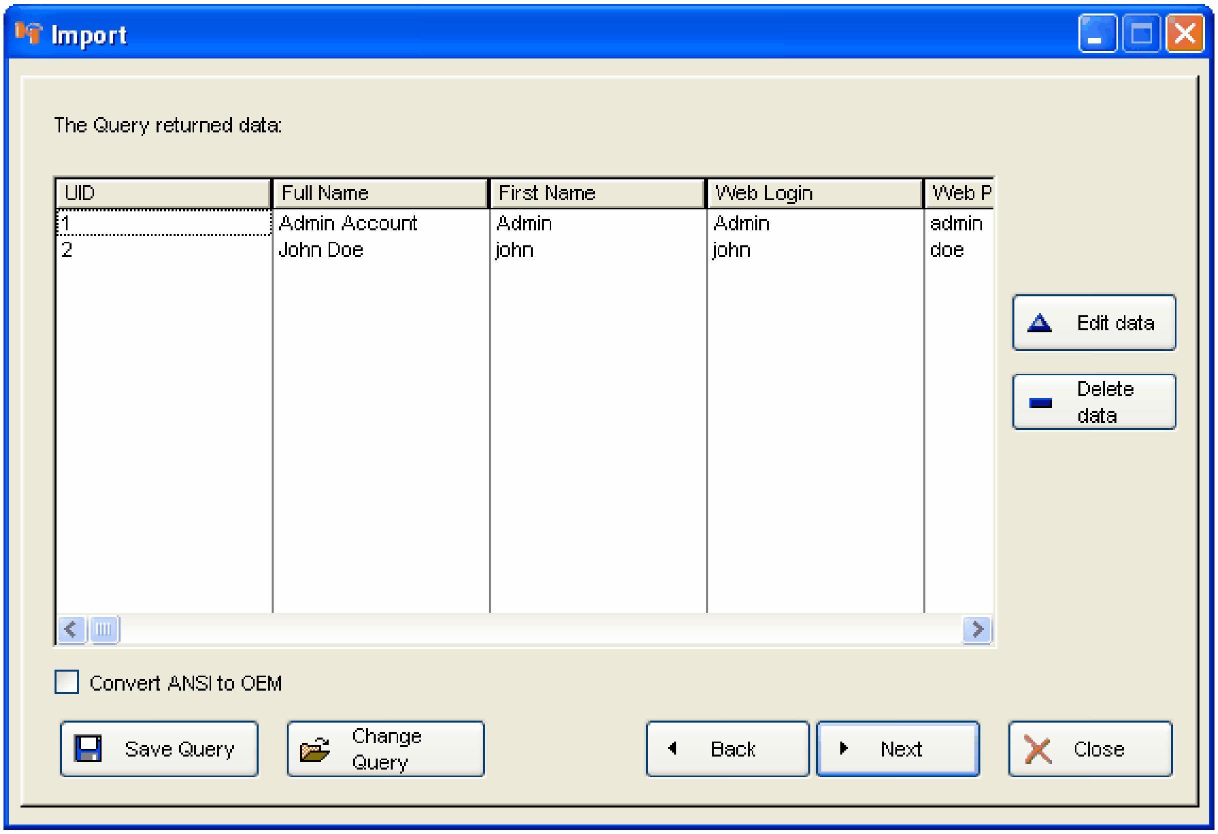
It may be easier to select the branch level, in this case Computers, and click the arrow to move all columns to the right side. I can later match only the fields I want to import.



Here, I have clicked the button with the arrow and the + sign to attempt to match fields automatically. I then manually drag any missed fields from the left column to the right column. NOTE: I did not match any field to the UserID field. Generally, you will not want to assign anything to ID type fields since they are automatically numbered.

On the next screen I could choose to filter data, but this is usually not needed so you would just click next to go to the next screen.

This screen shows the data found to be imported.



Finally, I click the Finish button to import my data. The browse screen should now show my imported data, but I can't edit the data from this screen. Just close the screen and use the other menu options to view and edit the imported data.

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