HELPDESK elite

USER MANUAL

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New Features

Employee screen

Ability to record messenger service details
Ability to record laptop and home worker details
Record and allocate the software installed on user's PC

Note: In versions for Access 2002 and 2003, the calendar does not exist in the system. It is advisable to manually enter dates.

INSTALATION AND PERFORMANCE

The main helpdesk system can be installed on a stand alone pc or a network. The separate user database should sit on each user pc and the path set to where the main helpdesk system is held on the network.

If you have the helpdesk mdb as opposed to the mde file , you may decide to split the front end screens and backend tables. This will enable better performance from the helpdesk system. If you are using Access 2000 you will also be able to move the tables to a SQL Server database via a wizard.

MAIN MENU

Upon loading the system, you will be taken to the main menu.
At this screen you are able to navigate to the various functions of the system such as helpdesk, orders etc.

The Options at this screen are:

1. Tracking
2. Helpdesk
3. Courses
4. Library
5. Orders
6. More
7. Quit

Before proceeding it is advised to go to the 'More' option on the main menu, then select the next ‘More’ option that follows and select the 'Update information' option. From here you can set the parameters which will be used throughout the system such as department, title, inventory type, contact type etc. These parameters are needed when entering contacts, printing reports etc.

MENU 2

The Options at this screen are:

1. Contacts
2. Inventory
3. Knowledge Base
4. Helpdesk Statistics
5. Reports
6. More
7. Return To Main Menu

MENU 3

The Options at this screen are:

1. Purge Information
2. Update Information
3. Invoice
4. Web Browser
5. Return To Previous Menu

TRACKING

This screen contains an overall summary of each employees computer related information.
You may decide to set up new computer details for a new employee. Details on courses, library loans, support call tasks and inventory items relating to each employee are set up in other parts of the system, but can be viewed as an overall summary on this screen. A print out of the computer details of each employee can also be produced at this screen.

Adding an Employee

1. Click the button labelled 'Add'.
2. Enter the employee details at the top and click on a tab to add details on contact, computer, login, sysfiles and network. Sysfiles can be pasted in if needed.
3. The record details are automatically saved when you exit out of this screen.

Deleting an Employee

1. Click the button labelled 'Delete'.

Printing an Employee

1. Click the button labelled 'Print'. You will be given the option to print the current screen or all employees.

Searching for an employee

1. Click the drop down box at the bottom left of the screen.

To navigate through the records you can click the left and right arrow buttons at the bottom left of the screen.

HELPDESK

This screen allows you to enter support requests from users.
Each time a new request is added it is allocated a task number. This task number can then be automatically emailed to the user.

Adding a new support request.

1. Click the button labelled 'New Log'
2. A task number is automatically allocated.
3. You can then fill in the remainder of the details

Searching for support requests

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing support requests

1. Click the button labelled 'Print'. You will be taken to a print options screen.
2. Select either the current or the technician tasks.
3. Click the Print button to proceed

Deleting support requests

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all helpdesk records.

1. Click the button labelled 'Refresh'

Showing all outstanding logs.

1. Click the button labelled 'Open Calls'
2. You will be taken to another screen. This screen shows the task number, who it is for and the date it was submitted.
3. Single click on a name to view the details. Closing this screen will take you back to the main screen which will hold details of the record you selected.
4. The printer button at the top right will enable you to print a record.

The total number of outstanding tasks is shown in the top right hand corner of the helpdesk screen.

Graphical picture of tasks to be done by employee.

1. Click the button labelled 'Overview' to see a pie chart representation of the tasks remaining for an employee.

The various helpdesk tabs are

Problem
Action Taken
Related
Audit Trail

Problem – Used for entering details of the user problem.

Action Taken – Brief notes of any steps taken to solve the problem.

Related – Assign related files to the helpdesk problem. Double click the location field to select a file. The button named 'Open' is used to open the related file.

Audit Trail – The status of the problem – How is the engineer progressing on solving the problem? Enter the date the task was done and the task itself.

Informing the user

1. Click the tab labelled 'Action Taken'.
2. Click the button labelled 'Inform User' You will be taken to an email type screen.
3. The 'To' box should be filled in with the users email and the 'Subject' box with a relevant subject.
4. Clicking the button labelled 'Task' will fill in the task number and message the user will receive
5. The additional message details box allows you to enter the rest of the message if it is required

Note: You must have Microsoft Outlook installed in order to use this feature

Creating a new appointment

A helpdesk appointment can be logged in Microsoft Outlook if necessary.

1. Click the tab labelled 'Action Taken'.
2. Click the button labelled 'Appointment'. You will be taken to an appointment screen.
3. Clicking the calendar buttons will allow you to enter start and end dates for the appointment.
4. Fill in the time details.
5. Putting a check in the reminder box will tell Outlook to remind you when the appointment is due. The number of minutes allows you to specify how many minutes before it is due you wish to be reminded.
6. Fill in the location of the appointment, subject and details.
7. Click the button labelled 'Create' to create the appointment in Outlook.

Note: You must have Microsoft Outlook installed in order to use this feature

Creating a new task

A helpdesk task can be logged in Microsoft Outlook if necessary.

1. Click the tab labelled ‘Action Taken’.
2. Click the button labelled Task. You will be taken to a task screen.
3. Clicking the calendar buttons will allow you to enter start and due dates for the task.
4. The other details are the same as for creating an appointment above
5. Click the button labelled 'Create' to create the task in Outlook.

Note: You must have Microsoft Outlook installed in order to use this feature

COURSES

This screen allows you to enter details of any courses the staff are to be sent on. An option to access a course booking screen is also included.

Entering details for a new course

1. Click the button labelled 'New'
2. Enter the course information. Details are automatically saved.

Displaying all courses

1. Click the button labelled 'List'. You will be taken to a new screen.
2. Click a course to see more details.
3. Close the list screen to see your selection on the main screen

Printing a course

1. Click the button labelled 'Print' to print preview the current course that is shown

Deleting a course

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all course records

1. Click the button labelled 'Refresh'

Exit the course screen

1. Click the button labelled 'Close'

COURSE BOOKINGS

This screen allows you to hold details of courses that have been booked for staff.

Make a course booking

1. At the courses screen, click the button labelled Booking. You will be taken to a course booking screen.
2. Click the button labelled 'New'
3. Fill in all details - clicking the booking option will mark the course as booked.

Searching for a course booking

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing course bookings

1. Click the button labelled 'Print'. You will be taken to a print options screen.
2. Select either the current screen or all bookings
3. Click the Print button to proceed

Deleting a course booking

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all course booking records.

1. Click the button labelled 'Refresh'

LIBRARY

This screen holds details of library items such as books and videos that have been borrowed by staff.

Enter a new library item

1. Click the button labelled 'New'
2. Select the employee and their department
3. Click the button labelled 'Select Item'. You will be taken to another screen.
4. The screen is divided into book, video or all items. Click a button to filter on the data you require.
5. Double click an inventory item to select it.
6. Close the inventory screen to see the selected details on the library screen.
7. Select the type of inventory item and fill out the remaining details

Searching the library

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing library items

1. Click the button labelled 'Print'. You will be taken to a print options screen.
2. Select either the current screen or all outstanding library items due back
3. Click the Print button to proceed

Deleting library items

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all library item records.

1. Click the button labelled 'Refresh'

Exit the library screen

1. Click the button labelled 'Close'

ORDERS

This screen records details of any orders that I.T have made for goods or products. The option is given to email the supplier to follow up on the progress or to mark a follow up as an Outlook task.

Enter a new order

1. Click the button labelled 'New'
2 Fill in the required details.
3 Select a supplier using the 'Select' button
4 The button labelled 'More' will show more details on the supplier selected
5 Putting a check into the box marked 'Close' will mark the order as closed.

Searching orders

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing orders

1. Click the button labelled 'Print. You will be taken to a print options screen.
2. Select either the current screen or all outstanding orders held
3. Click the Print button to proceed

Showing all order records.

1. Click the button labelled 'Refresh'

Entering order details

1. At the order details grid, double click the date box. You will be taken to a calendar screen. Select a date to be used.
2. Fill in all other details. The total figure will update depending on the quantity of goods.
3. Apply a percentage discount if required to the final totals. The remaining totals will be updated automatically.

Emailing the supplier

1. Click the button labelled 'Email Supplier'. You will be taken to another screen.
2. Providing you have selected a supplier, the email address is automatically picked up
3. Enter the subject and the message text. Do not enter any task details.
4. Click the button labelled 'Send Now' to send the email.

Note: You must have Microsoft Outlook installed in order to use this feature

Creating a new task

An orders task can be logged in Microsoft Outlook if necessary.

1. Click the button labelled Task. You will be taken to a task screen.
2. Clicking the calendar buttons will allow you to enter start and due dates for the task.
3. The other details are the same as for creating an appointment above
4. Click the button labelled 'Create' to create the task in Outlook.

Note: You must have Microsoft Outlook installed in order to use this feature

Exit the orders screen

1. Click the button labelled 'Close'

CONTACTS

The contacts option allows you to record information such as suppliers, support lines etc. These details can be utilised in other parts of the system such as orders.

Enter a new contact

1. Click the button labelled 'New Contact'
2. Type in all details. The box marked email is required if you wish to use the email features of the system. Also the 'Type' box should be filled in as this is used later for orders etc..

Searching contacts

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing contacts

1. Click the button labelled 'Print. You will be taken to a print options screen.
2. Select either the current contact option or all contacts held option
3. Click the Print button to proceed

Deleting contacts

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all contact records.

1. Click the button labelled 'Refresh'

Add the contact to Outlook

1. Click the button with the open book graphic and the caption 'Add to Outlook'
2. Answer 'Yes' to add the contact to Outlook.
3. Check your Outlook contacts to make sure it has been added.

Exit the contacts screen

1. Click the button labelled 'Close'

INVENTORY

The inventory option allows you to enter details of any equipment, hardware, software etc, currently held. You can also state who holds the equipment. This is useful for tracking movements of equipment within an organisation.

Enter a new inventory item

1. Click the button labelled 'New'
2. Type in all details. The current location and department are necessary as these are used for other aspects of the system when tracking user equipment status.

Searching the inventory

1. Click the button labelled 'Search'
2. Click the option you require and select the information in the drop down box
3. Click the button labelled 'OK' to proceed
4. Click close to view your search records

Printing the inventory

1. Click the button labelled 'Print to print all items in the inventory.

Deleting inventory items

1. Click the button labelled 'Delete'
2. You will receive a message asking you if you wish to delete the record.
3. Click 'Yes' or 'No' to proceed

Showing all inventory records.

1. Click the button labelled 'Refresh'

Exit the inventory screen

1. Click the button labelled 'Close'

PURGING SYSTEM INFORMATION

This option allows you to clean up the system and remove data held for library items that have been returned, orders that are now closed and helpdesk tasks that are closed.

1. From the main menu click the button labelled 'More'. You will be taken to another menu.
2. Click the button labelled 'Purge Information'
3. Select a purge option and click the button labelled 'Start'

UPDATING SYSTEM INFORMATION

This option allows you to set parameters which are used throughout the system. For example you can set details for the type of contacts you are holding, ie, suppliers, support etc, the departments held in your organisation etc.

1. From the main menu click the button labelled 'More'. You will be taken to another menu.
2. Click the button labelled Update Information'
3. Select an update button

KNOWLEDGE BASE

Use the knowledge base to keep a record of helpdesk problems and solutions used to fix them.

From the Helpdesk screen click the button labelled 'Knowledge base'. You may also access it from the main menu.

Solution types may be added from the ‘Update information’ option on the main menu.

Add a knowledge base item

1. Double click the subject area. This will bring up another screen.
2. Select a relevant solution type and enter a description, solution text and any notes applicable. The ‘New’ button can be used to add another solution from this screen.

Find a knowledge base item

1. At the main knowledge base screen select a solution type to see related solutions.

Email a knowledge base item

1. Single click on a subject and select an email name. Click the button labelled ‘Outlook’.

Printing a knowledge base item

1. At the main knowledge base screen, single click on a subject and then click the button labelled ‘Print’.

COMMON PROBLEMS

Use the common problems screen to keep a record of recurring problems and the number of the knowledge base article used to fix it.

From the Helpdesk screen click the button labelled ‘Common Problems’.

Type in the problem and knowledge base article number.

STACK DUMP

The stack dump screen can be used to keep track of user machine information.

From the Helpdesk screen click the button labelled ‘Stack Dump’.

Add a stack dump item

1. Click the button labelled ‘New’.

Amending stack dump details

1. Click the button labelled ‘Edit’ and type in the details.

View all stack dumps held

1. Click the button labelled ‘History’.
2. The navigation buttons can also be used to move through each record.

Print a stack dump item

1. Select the record you wish to print.
2. Click the button labelled ‘Print’.

ORDERS

The orders screen can be used for recording orders for items such as books, software, hardware etc.

From the main menu click the button labelled 'Orders.

Add a new order

1. Click the button labelled 'New' and enter information in the fields.

The order number, our ref and your ref fields are very important as these can be used in various searches to locate an order.

A supplier can be selected by clicking the button labelled 'Select'. When selecting a supplier use the 'Assign' button to assign the supplier to the Orders screen.
Once a supplier has been selected the 'More' button can be used to view extra supplier related information.

Add items in the order grid

Double clicking the date field will bring up the calendar.

The quantity and price boxes will alter the totals at the end of the line and the main totals at the bottom of the screen.

Use the Refresh button to update any totals.

The navigation buttons can be used to move through the orders held on the system.
The email button can be used to email the supplier any order details. It will pick up the supplier you have entered for the current on screen order.

HELPDESK STATS

Helpdesk stats provide you with graphical details in the form of bar and pie charts of the current status of tasks with the I.T/Computer department. The bar graph at the top breaks down the tasks by type..i.e. network, software, hardware etc.

The pie chart shows the percentage of tasks carried out in each department within your organisation.

The final stats shows the status of the outstanding tasks in the organisation. It will tell you how many outstanding tasks are urgent for example. Also the total number of helpdesk tasks and the total number of unsolved tasks.
The average turnaround in days is automatically calculated for tasks. An employee overview of tasks in the form of a pie graph can also be accessed from this screen.

WEB BROWSER

You may already have a web browser on your machine. Helpdesk provides you with an inbuilt web facility which you can use without loading up a separate package. If you have used a browser before the buttons will seem familiar.

Back - Moves back to the previous page

Forward - Moves forward to the next page

Home - Moves to the sites home page

Refresh – Loads the page again

Search – After typing in the web address you can either press the 'Return' key or press the 'Search' button.

The 'Save Location' button will bring up another screen for saving the web address. Type in the name of the site and any comments you wish to add.

The 'Load Site' button will bring up another screen for loading the stored web address. Double click a site to have it displayed in the browser window.

INVOICE

The invoice screen operates in a similar fashion to the orders screen and can be used for invoicing clients for work done by staff or for goods.
From the main menu select the Invoice option.

Entering a new invoice.

Use the 'Select' button to select a customer – these will be coming from your contacts information entered on another screen. Click the 'Assign' button to assign a contact to the current invoice on screen.

You can either enter the date manually or double click the field to bring up the calendar.
The engineer field is used to select a member of staff who actually did the work for the client. Each staff member has an hourly rate assigned to him/her. These can be altered by selecting the 'Update information' option from the main menu and selecting the technician option.

Select the engineer and enter the hours worked – the total will be automatically calculated and displayed.

To enter parts that have been used as part of the work carried out, double click the 'Part No/Repair Type' box on the grid. This will bring up a products screen. Use the search box on this screen to locate a part and then click the 'Assign' button to display it on the currently selected invoice.

In the invoice grid enter the quantity of the parts used and press the 'Return' or the 'Tab' key.
The unit and total prices will be calculated automatically as well as the overall totals in the bottom right of the screen.

At the bottom left of the screen a discount can be applied as a percentage which will affect the final totals.

Occasionally you may wish to set your own price (a package price) for work carried out and this can be done by selecting the 'Pkg Price' option located at the bottom right of the screen. Entering an amount in this field will add the VAT/Tax rate amount to the total to give a total package price figure.

If payment has been received the ‘Sale’ option at the bottom left of the screen should be ticked. This will display the transaction in the systems cashbook.

The ‘List’ button will display all invoices held in the system and gives a quick overview of transactions.

Use the ‘Refresh’ button to update the screen totals if any new information has been entered for the invoice.

CASHBOOK

The cashbook screen contains the actual sales that have taken place from information provided in the invoice screen. As previously mentioned the sales will only be shown in the cashbook providing the ‘Sale’ option has been selected on the invoice screen.

The company, date, reference and amount are shown along with the overall sales totals. The number of sales to date is also shown and there is an option to print the details.

The cashbook can also be exported to Excel by clicking the ‘Excel’ button on the cashbook screen. It will be saved in the on your hard drive in the location C:\Helpdesk_Cashbook.

REPORTS

The system is equipped with a series of reports – some available from the various screens in the system. The main reports screen is accessible from the main menu.

Each report can be previewed by clicking the ‘Print’ button. Two reports require criteria:

Helpdesk tasks by month
Inventory by employee

The dropdown box named ‘Month’ can be used to select the month you wish to filter on.
The dropdown box named ‘Employee’ can be used to select the employee you wish to filter on.

USER REQUESTS

By using the user submit screen a user can send their own helpdesk tasks to the system.

If an error message appears when this screen is opened it will because the system is expecting you to set a path for the destination helpdesk system. You should also enter the email of the manager or person to receive any helpdesk requests from users.

Sending requests

1. Select an employee from the dropdown 'Employee' box

2. Select a priority such as ASAP, from the dropdown 'Priority' box

3. Select a type such as software, hardware from the dropdown 'Type' box

4. Type in the problem you wish to submit to the helpdesk team

5. When you have completed all the details click the 'Submit' button

You will receive an email back with details of the task you submitted. This is used as your receipt or proof that you have made a request for assistance. For example...

TIME SENT: 03/03/02 20:13:17
URGENCY: Immediate
PROBLEM TYPE: Software
USER PROBLEM: Please get rid of this virus on my pc.
YOUR TASK ID IS: 14

KNOWN PROBLEMS

Compile Error Can't find project or library

This error may occur if you are using a different version of Outlook. For example on the Access 2000 version of the helpdesk system it is expecting Outlook 2000 to be on the users machine. If a different version of Outlook is being used a reference will have to be set to it. If you have the source code of the helpdesk system then the reference can be set by entering any code module and then selecting from the toolbar tools/references. Scroll down to find the Outlook reference. If it says MISSING OUTLOOK OBJECT then uncheck this box. Scroll down to find the correct Outlook reference and check the box next to it.

Run time error 2501 The open form action was cancelled

Use the solution above to fix this error.

Calendar

The calendar active x control should be selected when you first install Access onto your pc.

For Access database products

http://access-databases.com

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