

IT Journal Lite

Quick Start Guide

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

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

IT Journal Lite

User Detail View

Switch between Users & Ticket Details

Manage user information in an individual detail view or switch to a list view to see many users at once.

Keep detailed information about each person you support.

As an Open Solution you can modify the current fields or add more of your own to create a more customized solution.

Ticket History allows you to easily see the last few requests made by an individual.

Begin typing in the first empty row to create a new ticket that will be assigned to the current user record.

Track any additional details about a person.

Jump to the detailed ticket record.

A New Ticket will be assigned to the current user record.

The screenshot shows a web browser window titled "IT_Journal_Lite" with a navigation bar containing "Users" and "Tickets" tabs. Below the navigation bar are buttons for "New", "Delete", and "Find". The main content area is split into two panels: "User Information" on the left and "Ticket History" on the right. The "User Information" panel shows fields for "User ID: 0126", "First Name: Jane", "Last Name: Clarke", "Location: Main Office", "Department: Quality Assurance", "Office Phone: 312 555-1212", "Ext.: 123", "Alt Phone", "Email: jane.clarke@company.com", and "Alternate E-mail". The "Ticket History" panel contains a table with columns "Ticket No.", "Task", "Technician", and "Status". The table lists three tickets: 0017 (unable to print, Tech 1, Open), 0012 (email not sending with attachment, Tech 2, Complete), and 0008 (needs assistance creating a pdf, Tech 2, Started). Below the table is a "Notes:" section with a text area and a "New Ticket" button. At the bottom of the browser window, there are navigation arrows and a "Browse" button.

The User Information panel of the Users layout is where you should manage all your information regarding people making requests.

The Ticket History panel of this layout provides a history or request of each user. It is not designed to be the main location to manage user requests.

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Ticket Detail View

The screenshot shows the IT Journal Lite Ticket Detail View interface. The window title is "IT_Journal_Lite". The main header includes "IT Journal:Lite" and navigation links for "Users" and "Tickets". Below the header are buttons for "New", "Delete", and "Find". The interface is divided into two main panes: "User Information" on the left and "Ticket Details" on the right.

User Information: Includes fields for "User ID: 0126", "First Name: Jane", "Last Name: Clarke", "Location: Main Office", "Department: Quality Assurance", "Office Phone: 312 555-1212", "Ext.: 123", "Alt Phone", "Email: jane.clarke@company.com", and "Alternate E-mail".

Ticket Details: Shows "Ticket:0012" with tabs for "Ticket" and "History". The "Task" field contains "email not sending with attachment", "Status" is "Complete", "Type" is "Problem", and "Priority" is "Medium". The "Details" field contains "unable to send proposal to client". The "Associated File" field is empty. The "Assigned Technician" is "Tech 2", "Date Assigned" is "11/7/2004", "DueDate" is empty, and "Date Complete" is "11/8/2004". The "Hours" field is empty. The "Resolution" field contains a note: "Monday, November 8, 2004 - 3:58:28 PM attachment was of the 5MB size limit. assited here in compressing the file." There are "Add Note" and "Clear" buttons next to the resolution field.

Callout Boxes:

- "Switch between Users & Ticket Details" points to the "Users" and "Tickets" links in the header.
- "Reports to help manage unresolved requests. View open tickets on screen or print them." points to the "Print Open Tickets" and "View Open Tickets" buttons.
- "All tickets are related to a user, allowing you to view user information assigned to each ticket." points to the "User Information" pane.
- "Attach any relevant files to the ticket. *" points to the "Associated File" field.
- "Keep detailed notes about the resolution of a ticket. Using the 'Add Note' button will format your entry with a time stamp." points to the "Add Note" button and the resolution text.
- "The Record Search field will allow you to search for a key word or phrase in the Task, Details, and Resolution fields simultaneously." points to the "Record Search" field at the bottom.

The user information in this pane will remain even if the person leaves your company and is deleted from the main users table. This will allow you to keep detailed records of the work being done even as your company is changing.

A few calculations built into this Solution rely on the Status field being assigned to one of the predefined in values. Changing the values in the Status value list will cause these calculations to break. All other value lists can be modified as needed to meet your specific needs.

* See FileMaker Help for rules regarding attaching file/s