

CLIC Management Software

# MANUAL



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## 1. Introduction

The CLIC Management System is developed for admin side, not for the clients' side. Main motto for this application is to make work easier. In this application, it's able to add new applicants, edit applicants from old data, back up data for all applicants, add new inventories, modify inventories, view upcoming clients scheduled with pick up date, generate report for certain range of dates, and also print report.

This application makes life easier. Moreover, it saves lots of time saving data for applicants. This application have a facility to avoid duplicate data. It tracks all data of applicants.

There's always some parts to be upgraded or broken. Have fun to explore and break it. : D

- **Notice**

When this manual is finished, our server for CLIC is not on yet. So we have to use SQLExpress to set up the local host computer server, also use SQL Server Management Studio (SSMS) to execute built-in database and back up new data added.

If the new server is on live, after relocate the database there and replace the connection string with the server. There's no need to use or download Visual Studio/SSMS/SQLExpress. Part 2 & 3 (Install and back up) can be discarded. Moreover, the registration part can be changed to a more secure way.

Before the VPN Server is ready, if the computer in use doesn't have the software above, please download them and set up quickly before launch the application. If the computer has installed those software already and your purpose is just for recording data. Feel free to use it now!

## 2. Install and execute software and database script

### 2.1 Download Software

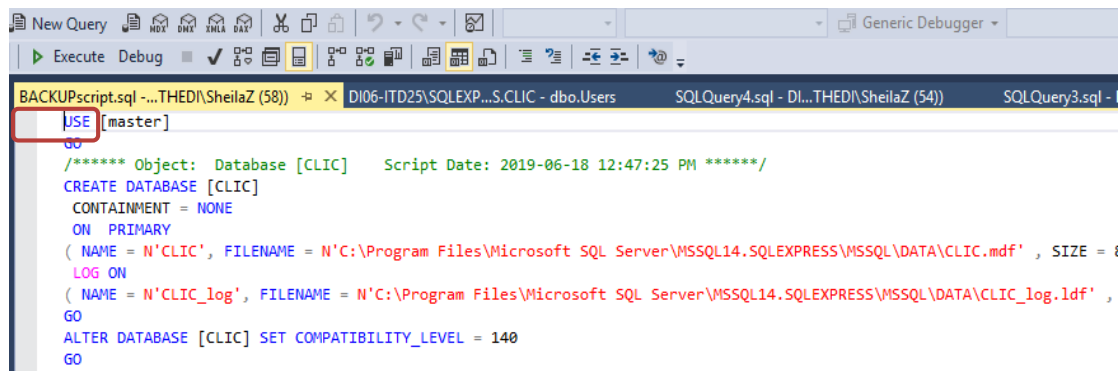
- Download [SQL Server 2017 Express edition](#).
- Download [SQL Server Management Studio \(SSMS\)](#).
- Download [Visual Studio](#). (.NET & SQL Database)

### 2.2 Install Software

- Install the three software downloaded.

### 2.3 Execute Database

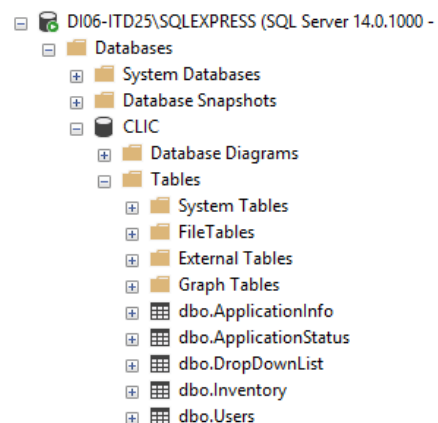
- Open the Script file in SSMS.



The screenshot shows the SQL Server Enterprise Manager interface. The 'Script' tab is active, displaying a SQL script. The script starts with 'USE [master]' and 'GO', followed by a comment 'Object: Database [CLIC] Script Date: 2019-06-18 12:47:25 PM \*\*\*\*\*/'. The main script is 'CREATE DATABASE [CLIC] CONTAINMENT = NONE ON PRIMARY ( NAME = N'CLIC', FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL14.SQLEXPRESS\MSSQL\DATA\CLIC.mdf' , SIZE = { LOG ON ( NAME = N'CLIC\_log', FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL14.SQLEXPRESS\MSSQL\DATA\CLIC\_log.ldf' , GO ALTER DATABASE [CLIC] SET COMPATIBILITY\_LEVEL = 140 GO'. The 'Execute' button is highlighted in the toolbar.

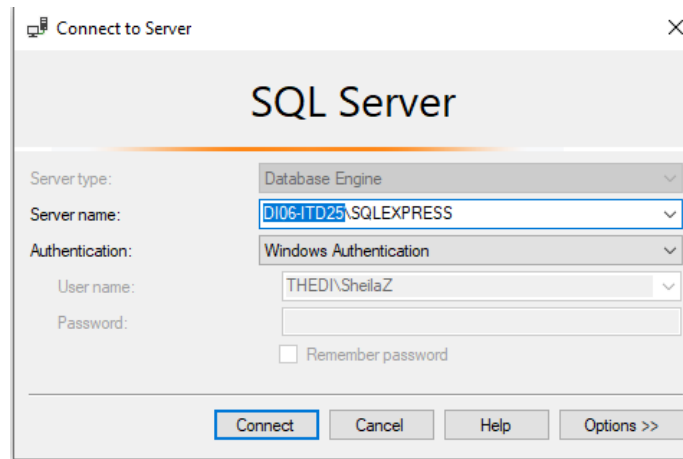
```
USE [master]
GO
/***** Object: Database [CLIC]    Script Date: 2019-06-18 12:47:25 PM *****/
CREATE DATABASE [CLIC]
CONTAINMENT = NONE
ON PRIMARY
( NAME = N'CLIC', FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL14.SQLEXPRESS\MSSQL\DATA\CLIC.mdf' , SIZE = {
LOG ON
( NAME = N'CLIC_log', FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL14.SQLEXPRESS\MSSQL\DATA\CLIC_log.ldf' ,
GO
ALTER DATABASE [CLIC] SET COMPATIBILITY_LEVEL = 140
GO
```

- Execute the script.
- Check the Database. Now refresh your database, and there will be a new database with 5 tables added.



## 2.4 Set Software and Connection

- Click connect – ‘Database Engine’ and copy the text before ‘SQLEXPRESS’.



- Open Visual Studio, then open the ‘DBConnection.cs’ file, replace the connection string with your server’s name.

---

```
public class DBConnection
{
    29 references
    public static SqlConnection GetConnection()
    {
        string connectionString = "Data Source = DI06-ITD25\SQLEXPRESS; Initial Catalog = CLIC; I
        SqlConnection connection = new SqlConnection(connectionString);
        return connection;
    }
}
```

---

- If you don’t have Visual Studio and don’t want to install it on your computer. Go to the directory “...CLICC\CLICDB\DBConnection.cs” and open it with Notepad, then replace the connection string.

---

```

namespace CLICDB
{
    public class DBConnection
    {
        public static SqlConnection GetConnection()
        {
            string connectionString = "Data Source = DI06-ITD25\\SQLEXPRESS; Initial Catalog = CLIC; Integrated Security = True";

            SqlConnection connection = new SqlConnection(connectionString);

            return connection;
        }
    }
}

```

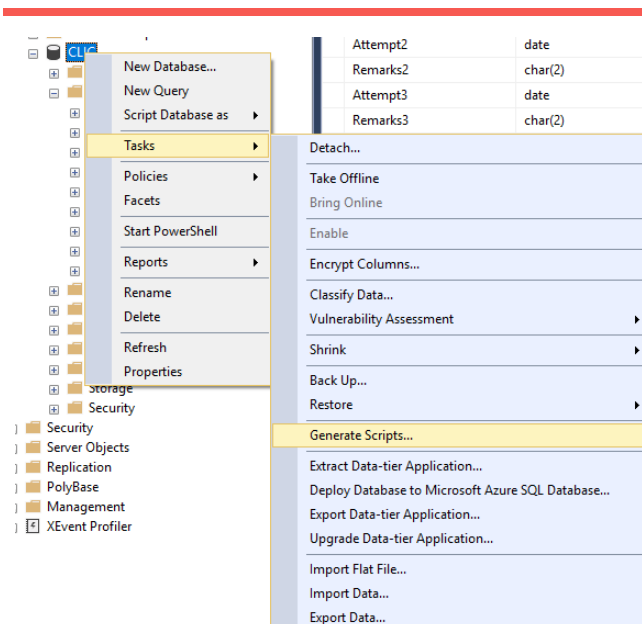
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- Now you can open the application and enjoy!
- The shared username is “di” and password is “123”.

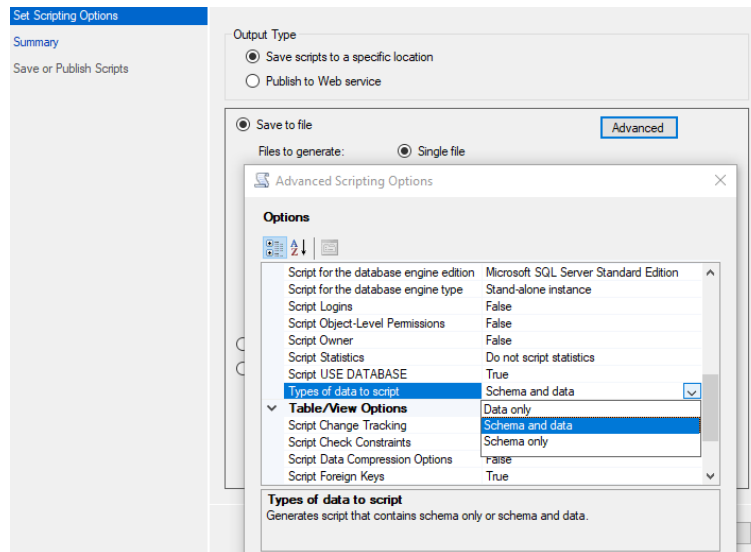
## 3. Back up data

### 3.1 Back up Data with SSMS

- Right click CLIC database in SSMS, go to Tasks – Generate Scripts



- Select the “Data Only” or “Schema and Data” for the advanced option.



## 3.2 Back up Data with with the Program

- Under the “Modify Applicants” / “Inventories” form, click “Back Up” Button. It will generate an excel spreadsheet for all the data in the data grid view.

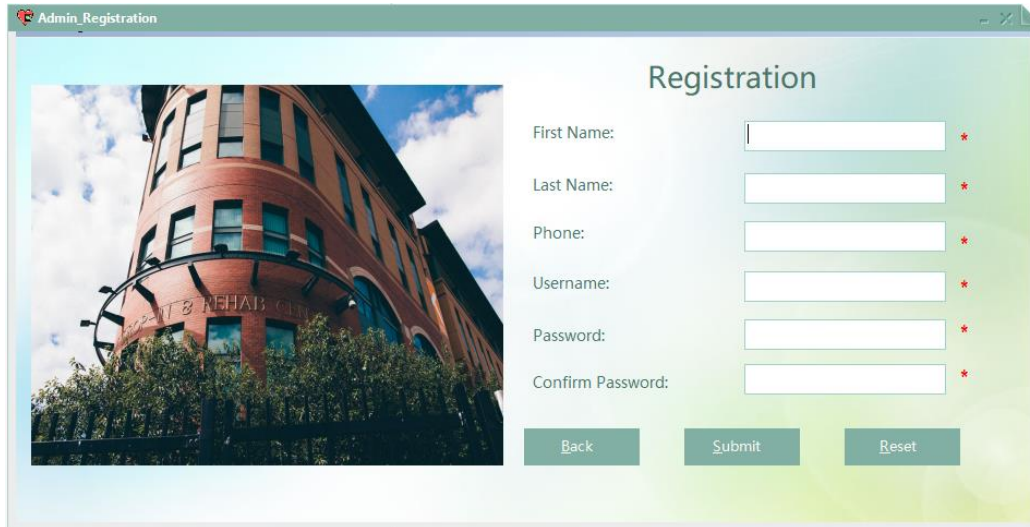
## 4. Start CLIC Program

### 4.1 Registration and Login

#### 4.1.1 Registration as Admin

- Set username and password.
- All fields are required in registration form.

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The screenshot shows a web browser window titled "Admin\_Registration". The page has a light blue and green background. On the left, there is a photograph of a red brick building with a curved facade. On the right, the title "Registration" is displayed above a form. The form contains six input fields, each with a red asterisk indicating it is required: "First Name:", "Last Name:", "Phone:", "Username:", "Password:", and "Confirm Password:". Below the form are three buttons: "Back", "Submit", and "Reset".

#### 4.1.2 Login as Admin

- Input Username and password to login into system.
- "Remember me" check box will save time in future.

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The screenshot shows a web browser window titled "Login". The page has a light blue and green background. At the top center, there is an orange circular logo with a white 'd' and a dot. Below the logo, the title "Login" is displayed. The form contains two input fields: "Username" with the text "di" and "Password" with three asterisks "\*\*\*". Below the password field is a "Reset" link and a "Remember Me" checkbox which is checked. At the bottom of the form is a "Login" button. Below the button, there is a link that says "New User? Register Here..!".

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## 4.2 Add New Application

### 4.2.1 Insert New Application

- Insert all required data in application form.
- No of children should insert in application.
- If there is no children put 0 instead of blank.

### 4.2.2 Edit Older Application

- While inserting new application if “First Name” and “Last Name” match exactly within the database, it will not let you to add this application.
- When it finds the older application with same name it will ask to go back to older application.
- If press “Yes” it will show the modification form for the applicant that already stored in application.
- If press “No” it will come back to the application form.

The screenshot displays the 'CLIC Management System' interface. On the left is a dark blue sidebar menu with options: Menu, Applicant, New Applicant, Modify Applicant, Inventory, Upcoming Days, Report, Sign Out, and Exit. The main content area is a light green form titled 'Add New Application'. The form contains the following fields and controls:

- Date Of Application:** A date picker set to 2019-06-25.
- Call Status:** A dropdown menu set to 'Waiting'.
- First Name:** A text input field containing 'Karen'.
- Last Name:** A text input field containing 'Diaz'.
- Date Of Birth:** A date picker with a checked checkbox for 2019-06-25.
- Primary Phone:** A text input field containing '4033333333'.
- Secondary Phone:** A text input field containing '4035555555'.
- Email:** An empty text input field.
- Address:** A text input field containing 'T0S1T3'.
- Postal Code:** A text input field containing 'T0S1T3'.
- Have you stayed (for) last (6) months?:** A radio button group with 'Yes' and 'No' options.
- If applicable, how many children are living with you?:** A text input field containing '0'.
- Are you a Case Manager representing a Client? (Applying on behalf of?):** A radio button group with 'Yes' and 'No' options.
- Requested Item:** A dropdown menu set to 'Desktop'.
- Requested Notes:** A large empty text area.

A modal dialog titled 'Update Client Details' is open in the center of the form. It contains the message: 'Applicant Already exist.! Are you sure to update this application?'. Below the message are two buttons: 'Yes' and 'No'.

At the bottom of the form are two buttons: 'Submit' and 'Reset'.

## 4.3 View and Search Applications

### 4.3.1 View Applicants

- Show All Cases
  - ✓ List all Cases sorted by Requested Date.
- Waiting Cases
  - ✓ List all Waiting cases.
- Following up Cases
  - ✓ List all Following-up cases.
- Closed Cases
  - ✓ List all Closed cases.

### 4.3.2 Search Applicants

- List applicants match the search text.
- Search by name, agency, case manager, phone No and address.
- **You can always double-click a row to modify!**

### 4.3.3 Print Applicants

- Backup can save all data in a excel spreadsheet.
- Meanwhile, you copy some certain data and save as other file like txt, doc, xls, and etc.

CLIC Management System

Menu

Applicant

New Applicant

Modify Applicant

Inventory

Upcoming Days

Report

Sign Out

Exit

Search Applicant:

Search

Clear

Waiting Case

Following Up Case

Closed Case

Show All Cases

Date Requested	Name	Phone	Sec Phone	Case Manager	Agency	Requeste Item	Call Status	Pickup No
2019-05-30	Albert Malone	4034027738	5045555151	George David	Calgary ...	Desktop	Waiting	
2019-05-30	John Duma	4036293040	5065665151	Shawn Mont...	NO	Desktop	Closed	883 ...
2019-05-30	Annaliza Sawchuk	5878303668		NO	NO	Desktop	Closed	854 ...
2019-05-31	Vincente Mbenza	4036158046	5065775151	Tania Cruz	INN Fro...	Desktop	Closed	880 ...
2019-06-03	Amina Abakari	4039981775	6096776161	Sana Zaidi	Sunrise ...	Desktop	Closed	897 ...
2019-06-03	Vikey Myan	4036056179	6066886161	No	No	Desktop	Waiting	
2019-06-03	Porothy King	5875808734	6056556161	NO	NO	Desktop	Closed	564 ...
2019-06-04	Austin Cummins	4039694646	4039684932	Andrea God...	Calgary ...	Desktop	Closed	874 ...
2019-06-10	Mohamed Kharif	5877032326		No	No	Laptop	Closed	435 ...
2019-06-11	Mulugeta Gidex	5877005221	4036711406	No	No	Desktop	Waiting	
2019-06-11	Steven Orset	4036513278		No	No	Desktop	Closed	810 ...

Edit Application

Delete Application

Back up

## 4.4 Modify Applications

- Modify application is designed to change any detail of application.
- Requested date cannot be changed in Modify Application form.
- If application is **denied** then it has to be **entered in comment section as “Denied”** and saved.
- If an application is closed and the PC is given out, the pickup number has to be entered.

The screenshot shows a web application window titled "Application Modification". The form is divided into two main sections. The left section contains personal and contact information fields: "Date Of Application:" (2019-01-15), "First Name:" (Abeba), "Last Name:" (Mebtahtu), "Date Of Birth:" (1986-01-26), "Primary Phone:" (5878892339), "Secondary Phone:" (empty), "Email:" (aswarega@yahoo.com), "Address:" (808 2631 38 st NE), "Postal Code:" (T1Y3Z8), "Number Of Children:" (2), "Case Manager:" (NO), "Agency:" (NO), "Requested Item:" (Desktop), and "Requested Note:" (Duplicate-Approved before). The right section, titled "Modify Application", contains fields for call attempts and remarks: "Call Attempt 1:", "Remarks 1:", "Call Attempt 2:", "Remarks 2:", "Call Attempt 3:", "Remarks 3:", "Scheduled Pick-Up:", "Date Picked-Up:", "Comments:" (with a dropdown menu showing "Denied"), "Pick-Up Number:", and "Call Status:" (Closed). At the bottom of the form are three buttons: "Back", "Save", and "Reset".

## 4.5 View Upcoming Clients for Pickup

- If any application have upcoming scheduled date for pickup, it will show in upcoming days form.
- The application can be edited as well – if applicant wants to come earlier or later.

CLIC Management System

Menu

Applicant

Inventory

Upcoming Days

Report

Sign Out

Exit

Applicants Scheduled for Pick Up

Date Requested	Name	Phone	Requested Item	Requested Note	Call Status	Date Scheduled	Comments
2019-02-13	Rosalie Porter	4034730997	Desktop	No Special ...	Following-Up	2019-06-29	
2019-02-20	Katherine Jeffries	5875774066	Desktop	No Special ...	Following-Up	2019-06-30	
2019-02-22	kavitha arva	4039039726	Desktop	No Special ...	Following-Up	2019-07-11	

Modify

## 4.6 Generate Reports

- Can Generate Report by range of dates requested.
- Can Generate Report by Pickup dates.

CLIC Management System

Menu

Applicant

Inventory

Upcoming Days

Report

Sign Out

Exit

Select Date From: 2018-01-01

Select Date To: 2019-01-01

Generate

Given Out On Pick Up Date

Clear

Print

Applications

From 2018-01-01 to 2019-01-01

Received: 824

Claimed: 484

Unclaimed: 259

Ineligible: 81

Claimed Desktop: 462

Claimed Laptop: 22

Unclaimed Desktop: 228

Unclaimed Laptop: 31

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## 4.7 View Inventories in Stock

- All Pc
  - ✓ List all PC in database.
- In Storage
  - ✓ List all PC that is in Storage.
- Deployed to DI
  - ✓ List all PC that is took for Drop in center Downtown.
- Claimed PC
  - ✓ List all PC that is given out to the Applicant.
- Not Working PC
  - ✓ List all PC that is not working after trying to Refurbishing.
- Recycled PC
  - ✓ List all PC that is Recycled.
- Recycled PC
  - ✓ List all PC that is Recycled.
- Recycled PC
  - ✓ List all PC that is Recycled.
- **You can always double-click a row to modify!**
- Backup Button will generate a spreadsheet for all data.

CLIC Management System

Inventory

Get All In Storage Claimed Deployed to DI Recycled Not Working

PC PickUps	PC Type	Make/Model	Date Built	Status	Details	Client/Recipient
819	Desktop	Hp Compaq 82...	2019-05-05	Claimed/Given...		
820	Desktop	Dell Optiplex 70...	2019-05-05	Claimed/Given...		
821	Desktop	Dell Optiplex 70...	2019-05-05	Claimed/Given...		
822	Desktop	Dell Optiplex 790	2019-05-05	Claimed/Given...		
823	Desktop	Dell Optiplex 70...	2019-05-05	Claimed/Given...		
824	Desktop	Dell Optiplex 70...	2019-05-05	Claimed/Given...		
825	Desktop	Dell Optiplex 790	2019-05-05	Claimed/Given...		
826	Desktop	Dell Optiplex 70...	2019-05-05	Claimed/Given...		
827	Desktop	HP 6200	2019-05-05	Claimed/Given...		
828	Desktop	Hp Compaq 82...	2019-05-05	In Storage		
829	Desktop	Hp Compaq 6300	2019-05-06	Claimed/Given...		

Add Edit Delete Back Up

## 4.8 Add and Edit Inventories

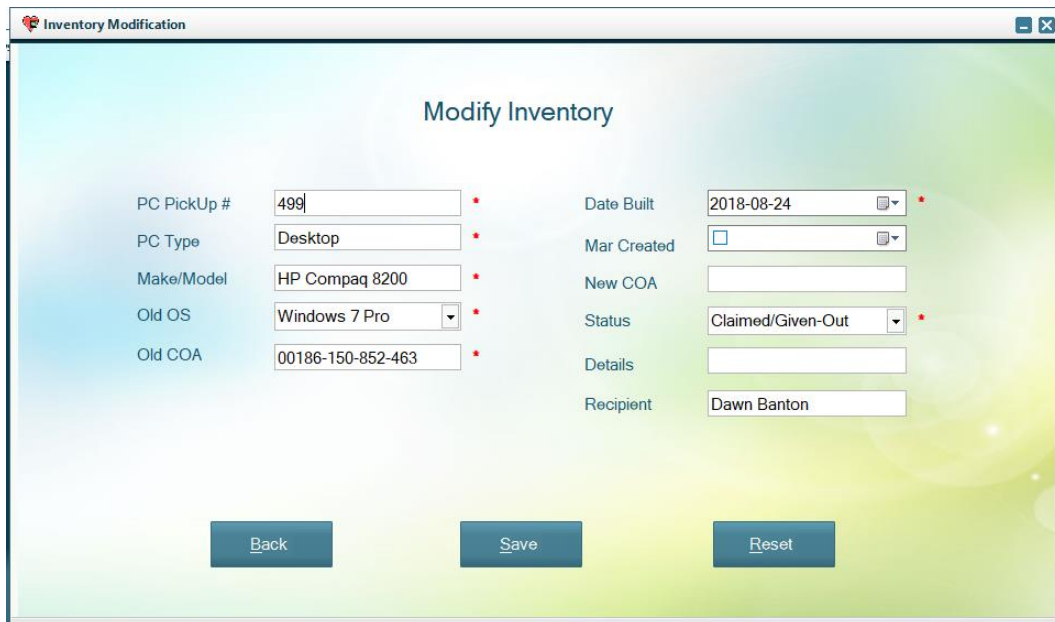
### 4.8.1 Add Inventory

- Add new Inventory as new donation arrives.
- Don't miss required fields.

### 4.8.2 Edit Inventory

- Edit older inventory if changes are needed.

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The screenshot shows a web application window titled "Inventory Modification". Inside, there is a form titled "Modify Inventory". The form is divided into two columns of input fields. The left column contains: "PC Pickup #" with the value "499", "PC Type" with the value "Desktop", "Make/Model" with the value "HP Compaq 8200", "Old OS" with a dropdown menu showing "Windows 7 Pro", and "Old COA" with the value "00186-150-852-463". The right column contains: "Date Built" with a date picker showing "2018-08-24", "Mar Created" with an empty checkbox, "New COA" with an empty text field, "Status" with a dropdown menu showing "Claimed/Given-Out", "Details" with an empty text field, and "Recipient" with the value "Dawn Banton". Each input field has a small red asterisk to its right, indicating it is a required field. At the bottom of the form, there are three buttons: "Back", "Save", and "Reset".

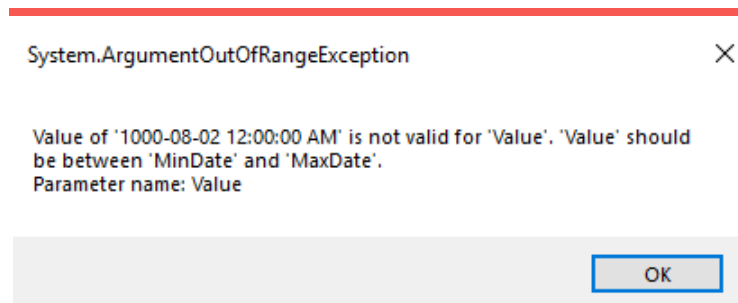
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## 4.9 Log out and Exit the Program

- Logout will take back to login screen and login as different User.
- Exit Program will close program.

## 5. Q & A

- When I double click one row to edit, it gives me error as follows. What should I do?



A: Quit the program and restart, it will work fine. Also make sure the new data does not extend the range.

- How to copy multiple rows with header to a document to make calls or for other purpose?

A: Select a row first, multi-select rows and press "Ctrl + C", paste the data to a word or excel.

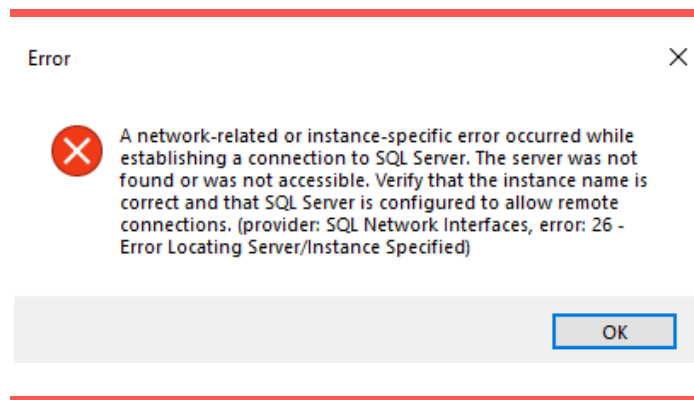
- How to print a report?

A: Under the "Report" form, press "Print" button. It will show a dialog with the preview of the group box with the numbers.

- When I input the data, the dateTimePicker becomes really slow. What should I do?

A: When input date more than 3 times in .net, the performance of loading speed will reduce. The suggestion is to save 2 dates at one time, reload and then save the rest dates.

- When I try to login, it gives me error as follows. What should I do?



A: Make sure to replace the “connection string” in “DBConnecion.cs” first!

In addition, if your OS doesn’t have Visual studio installed, even if you changed the connection string, it might still need some of the required component of Microsoft Visual Studio. So please download it first.

- For some reason a client picked up more than one computer, how do I avoid the duplicate notification?

A: The suggestion is to change the client name a bit like “Lastname1”, “Lastname2” when you added applications. Don’t put multiple computers in one application, it will cause counting error. One computer per application only!

- For the report form, the numbers added don’t match. Why?

A: The query for the rejected application is to check if there’s a “Denied” command in the “Comment” Section. So if the application closed, but there’s no PC pickup number or “Denied” comment, please be more patient to check if there’s any missing data.

Also, the numbers which are generated on pickup dates require the pickup date not null. If you didn’t put pickup date when there’s a claimed computer with pickup number, it might have the unmatched problem.

- There’s no perfect application and our comments are not detailed. Feel free to contact us if you have more questions.