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Welcome to Administration Guide for **NetResults Tracker**™.

Admin

This guide provides information about customizing and maintaining your Tracker system. Topics such as user administration, email and workflow configuration settings within each workgroup (database) are covered in this guide. Information on installation and security are provided in the [Installation Help Guide](#).

Tracker is available in two versions: **Tracker Standard Edition** and **Tracker Enterprise Edition**. Tracker Enterprise Edition includes all of the features of Tracker Standard Edition plus some additional features such as [Alerts](#), [Discussions](#), and the [Submit via Web for Unregistered Users](#) to provide improved support for enterprise-wide use.

Prior to using the operations described in this guide, you should create a new workgroup using the information in the [Workgroup Management System Guide](#). The Workgroup Management System is the central interface for creating multiple workgroups within your Tracker system.

[Click here](#) for the Tracker User's Guide. Typical operations done by end users are covered in this guide.

## Glossary of Terms

**Account Info** - A link on the Home Page where you can update your user profile information such as address, phone number, email address, etc.

More information: [Account Information](#)

**Add & Copy** - The operation on the Add Page that allows you to add a record while saving the information currently entered in the fields on the Add Page that can be used to submit another record.

More information: [Adding Records](#)



**Add Page** - The page where a new record can be submitted to the system.

More information: [Adding Records](#)

**Add Similar** - The operation on the View Page that allows you to add a record using the information from the record you are viewing.

More information: [Viewing Records](#)

**Add via Email** - Also known as Submit via Email, this separately purchased option allows end users to submit records via an email message instead of logging into Tracker.

More information: [Adding Records via Email](#)



**Admin Page** - The area where you can customize Tracker. The [fields](#), [workflow](#), [email preferences](#) and many other items can be customized in this area.

More information: [Admin Guide](#)



**Alerts** - Per-record email notifications triggered at a particular date & time, or relative to a date field or when there is a lack of change of status within a certain period of time.

More information: [Alerts \(Enterprise Edition Only\)](#)

**Allowed Add States** - The group of states to which a new record can be routed based on the combination of Form and Project selected for the record.

More information: [Managing Workflows](#)

**Attachments** - Files or links that can be added to a record.

More information: [Record Attachments](#)

**AutoFill Item** - This feature allows you to configure a field to automatically capture information about an end user's environment when submitting a record on the Add or Submit Pages.

More information: [Managing Fields](#)



**Calendar** - The icon that can be used to display a calendar for selecting dates. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click **Now** to set the date field to be the current date and time. Click on **Exclude Time** if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click **Set Time** if you wish to include the current time information in the field. Click **OK** to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the **Business Days** option in the [Preferences](#) section. Click **Cancel** to dismiss the calendar without saving changes.

**Child pulldown** - A pulldown which is dependent on a parent pulldown. When an option menu item is selected in the parent pulldown, only the option menu items related to the item in the parent pulldown will be available in the child pulldown.

**Clone** - A duplicate of a record created using the [Cloning](#) feature. Clones can also be created using the [Task](#) operation.

**Color Preferences** - The Admin section where color settings for Tracker pages can be configured.

More information: [Color Preferences](#)

**Default Add State** - The state to which a newly added record will be routed by default based on the combination of Form and Project selected for the record.

More information: [Managing Workflows](#)



**Delete** - The operation which you can use to mark a record as deleted.

More information: [Deleting Records](#)

**Dependent Pulldowns** - The feature that allows a relationship to be created between pulldowns. When an option menu item is selected in a parent pulldown, the values in a child pulldown are limited to only those option menu items that are associated with the value selected in the parent pulldown.

 **Discuss** - The area where you can [view](#), [reply](#) or [start](#) a new discussion thread for a record.  
More information: [Discussions](#)

 **Edit Page** - The page where the [fields](#), [attachments list](#), [source code list](#) and [alerts settings](#) for a record can be modified.  
More information: [Editing Records](#)

 **Edit Records** - The icon that can be used to edit a set of query results.  
More information: [Querying Records](#)

**Email Configuration** - The Admin section where Outgoing (email notifications based on actions performed on a record) and Incoming (Submit via Email feature) mail options can be configured.  
More information: [Email Configuration - Overview](#)

**Export** - The **Export** link can be used to export report data from the reports on the [History](#), [Home](#), [Query](#) or [Metrics](#) pages.

**Field** - A part of the form where data is collected. Fields are added and edited in the [Managing Fields](#) section.

 **Field Help** - Placing your cursor on this icon in the Add, Edit and Task will display additional information about each field. Field Help can be enabled / disabled via the [Preferences](#) page. Field Help text can be customized in the [Managing Fields](#) section.

**Field Visibility** - A feature which allows you to control where (on what pages such as Add, Edit, reports, email notifications, etc.) and by whom (which user groups) fields can be accessed.  
More information: [User Administration - Group](#)

**Floating user account** - Also known as non-Restricted, this type of user account is associated with a floating license.  
More information: [Users](#)

**Form** - A set of fields that combined make up a particular "record". For example, if you are using Tracker for issue tracking, the fields that are filled out on the Add Page are part of the "form" for submitting issues into Tracker. It is possible to set up multiple forms (e.g. you may want to have a form for submitting bugs and a

separate form for submitting enhancements. Each form has its own set of fields that are collected when submitting a record).

More information: [Managing Forms](#)

**General Preferences** - The Admin section where workgroup-wide preferences can be set (e.g. choosing whether a soft delete or hard delete is done when records are deleted, how are user's names displayed throughout the workgroup pages, etc.).

More information: [General Preferences](#)

**Global Field Properties** - When a field is present on form(s), it can have global properties (the field has the same properties on all forms) or it can have properties set differently on one or more forms.

More information: [Managing Forms](#)



Help

**Help** - Clicking on this icon in the top button bar will display the User Help Guide in a second browser window. Clicking on this link in the Status bar will display the context-sensitive Help section in a second browser window.

More information: [Administrative Help Guide Table of Contents](#)



**History Page** - The page where a query can be run to search for information in the audit trail of the records.

More information: [Record History](#)



**Home Page** - The first page a user sees when logging into a workgroup. It can be configured to display up to 3 reports and includes links to [update your account information](#) and [set your preferences](#).

More information: [Logging In](#)

**Knowledge Base** - This separately purchased option allows your end users to search for information to resolve questions and issues without logging into Tracker.

More information: [Knowledge Base Overview](#)

**License Manager** - The interface where your Tracker license keys are stored.

More information: [Entering License Information](#)

**Login Options** - The Admin section where Login and Self Registration Page settings can be configured.

More information: [Login Options](#)

**Login to workgroup** - The operation used to access a workgroup.

More information: [Logging In](#)



Logoff

**Logoff** - Clicking on this icon in the toolbar will end your Tracker session.

**Maintenance** - This Admin section contains the [Delete All Records](#) operation which can be used to remove all records from a workgroup while preserving the configuration (workflow settings, fields, email notification rules, etc. are not altered by this operation). The rest of the utilities in this section are only to be used under the guidance of NetResults Technical Support for troubleshooting purposes.

**Manage Fields** - The Admin section where fields can be defined and pulldown fields can be customized (e.g. defining option menu items, associating items between dependent pulldowns).

More information: [Managing Fields](#)

[Customizing Menu Items](#)

**Manage Forms** - The Admin section where forms can be defined and fields can be selected for each form.

More information: [Managing Forms](#)

**Manage Projects** - The Admin section where projects can be defined and the forms, workflow, state managers and visibility can be configured for each project.

More information: [Managing Projects](#)

**Manage Workflows** - The Admin section where workflow configuration can be set up (e.g. creating states and transitions for processing records).

More information: [Managing Workflows](#)



Metrics

**Metrics** - The page where you can generate graphical reports such as bar, line or pie charts.

More information: [Metrics](#)

**Obsolete Item** - A value in a pulldown field that has been marked as inactive. Option menu items can be marked as obsolete to allow the item to be preserved in existing records, but an obsolete item cannot be selected when adding new records or modifying existing records.

More information: [Customizing Menu Items](#)

**Option Menu Item** - Values in a pulldown field.

More information: [Customizing Menu Items](#)

**Parent Pulldown** - A pulldown that has one or more child pulldowns associated with it. When an option menu

item is selected in the parent pulldown, it limits the option menu items available in the child pulldown to only those values associated with the item selected in the parent pulldown.

**Preferences** - A link on the Home Page where you can set user preferences such as [selecting the reports](#) displayed on the Home Page, [choosing your local time zone and other date settings](#) among others.

More information: [Preferences](#)

**Print** - The **Print** link can be used to print the report(s) displayed on the [History](#), [Home](#), [Query](#) or [Metrics](#) pages.

**Project** - A plan or design. A project can be a collection of records or actions that need to be completed by a particular group of people. Projects can be defined to use certain forms, workflows, state managers and visibility to particular user groups.

More information: [Managing Projects](#)



**Query Page** - The page where reports can be generated (including the reports available on the [Home Page](#)). You can run [ad-hoc queries](#), [saved queries](#), [advanced saved queries](#) and configure [report layouts](#).

More information: [Querying Records](#)

**Record Visibility** - A feature that allows you to control which records a user is allowed to access based on his / her user group membership. For example, if you have external vendors, customers or partners logging into Tracker, you may not want Company A to access Company B's records.

More information: [General Preferences](#)

**Restricted User** - This type of user account has a limited set of privileges available as opposed to a static or floating user account.

More information: [Users](#)

**Restricted User Group** - Members of this type of user group can be Restricted or non-Restricted user accounts. This type of user group has a limited set of privileges.

More information: [User Groups](#)

**Self Registration** - This feature allows users to create their own user account.

More information: [Self Registration](#)

**Send Email** - A utility that an Admin can use to send email to a user or user group. Most commonly used for troubleshooting email configuration issues.

More information: [Sending an Administrative Email](#)

**Source Code Control** - Tracker can be integrated with Microsoft Visual SourceSafe to associate relevant source files to a record.

More information: [Source Code Control Integration Overview](#)

**Standard User Group** - Also known as non-Restricted user groups, members of this type of user group can only be user accounts with Static or Floating license types. Restricted users cannot be members of a standard user group.

More information: [User Groups](#)

**State** - A [state](#) represents a step in the workflow process.

**State Group** - Workflow states that share a common characteristic. For example, a state group called "Active" could include all states where a record is actively being processed; the group excludes states such as "Closed" or "On Hold" or "Deferred". State groups can be created for the purpose of simplifying report criteria (e.g. return all records in "Active" states) or workflow configuration (e.g. allow end users to choose from "Active" states when deciding where to route a record).

More information: [Workflow States](#)

**State Manager** - A user assigned to a certain state in the State Managers section for a specific project. State Managers can be used as a routing table for automatic assignment for the Add or Task operations.

More information: [Managing Projects](#)

**static user account** - Also known as non-Restricted, this type of user account is associated with a static license.

More information: [Users](#)

**Submit via Email** - Also known as Add via Email, this separately purchased option allows end users to submit records via an email message instead of logging into Tracker.

More information: [Adding Records via Email](#)

**Submit Page Options** - The Admin section where the Submit via Web Page for Unregistered Users can be configured.

More information: [Submit Page Options](#)

**Submit via Web for Unregistered Users** - This separately purchased option allows end users to submit records via a web form instead of logging into Tracker.

More information: [Submit via Web for Unregistered Users](#)

✓ **Task** - The operation that can be used to process a record. The Task operation prompts you with transitions available for processing a record based on the record's current state, prompts you with the fields that correspond to each transition and routes the record automatically based on the [workflow settings](#).

More information: [Marking a Task Complete](#)

**Task Fields** - Fields presented to the user when a transition is selected to process a record during the Task operation.

More information: [Workflow Transitions](#)

**Transition** - A path used to move records from one state to another in the workflow.

More information: [Workflow Transitions](#)

**UMS Administrator** - The user account for accessing UMS. The User ID of the UMS Administrator is "useradmin".

More information: [Overview](#)

**User Administration** - The Admin section in a workgroup where user accounts and user groups are maintained.

More information: [Users](#)

**User Management System (UMS)** - The interface for adding and maintaining user accounts for all workgroups in Tracker.

More information: [Overview](#)

**User Preferences** - The Admin section where preferences can be set that are applied to static/floating and restricted user accounts when they are added to the workgroup.

More information: [User Preferences](#)

**User Sessions** - The Admin section that lists which users are currently logged into the workgroup and allows an Admin user to logoff users if necessary.

More information: [User Sessions](#)



**View Page** - The page where a record's fields, attachments, [clone info](#), [alerts](#), [source code list](#), [discussion threads](#) and [record history](#) can be viewed.

More information: [Viewing Records](#)

**WMS Administrator** - The user account for accessing WMS. The User ID of the WMS Administrator is "ptadmin".

More information: [Logging In](#)

**Workflow** - The set of steps that represents your organization's process.

More information: [Managing Workflows](#)

**Workgroup** - Created in the Workgroup Management System (WMS), a workgroup is an area with its own database and web pages. When a workgroup is created, you can select many parameters including what database type is used (Access, SQL Server or Oracle), what languages it supports (via the character set option) and where the web pages should be located. Each workgroup is intended to be an area independent of other workgroups (e.g. a workgroup has its own database and features can be enabled / disabled within each workgroup).

More information: [Adding a Workgroup](#)

**Workgroup Administrator** - The User ID "Admin" in each workgroup or any user in a workgroup that is a member of a group with the [Admin privilege](#).

**Workgroup Management System (WMS)** - The interface for creating and maintaining workgroups. An unlimited number of workgroups can be created in WMS. A user must have Local Administrator rights on the machine where Tracker is installed in order to access WMS.

More information: [WMS Overview](#)

## Overview

This section provides general information to help you start using Tracker for tracking different issues and managing information. This section will also introduce you to the various features and how they can play a role in your processes.

The first step is to determine what you will be tracking. The following questions can guide you in this step:

- What projects will be managed?
- What are the processes or forms associated with managing these projects?
- What data needs to be collected during those processes / on those forms?
- What steps are needed to complete the processes?
- Who completes the steps at each point in the processes?

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## Overview of Tracker structure

Tracker is made up of:

- **Project(s)** – A project is a plan or design. It can be a collection of records or tasks that are completed by a particular set of users or groups.
- **Form(s)** – A form is a set of fields that combined make up a particular "record".
- **Workflow(s)** – A workflow is a set of steps that represents a process.

The relationship between Project, Form and Workflow isn't strictly hierarchical. A Project has one or more Forms available for use in the Project. Each Form within a Project has one (and only one) Workflow associated with it for that Project (for use when an instance of that Form is created via the Add operation in that Project). The same Form may be used in other Projects with other Workflows. The same Workflow may be shared by multiple Forms (in the same Project or in different Projects). Workflow and Form are always related. Every Workflow is associated with (available for) at least one Form. An example of multiple Projects, Forms and Workflows handled in a Tracker workgroup is shown below:

Project 1

- Form 1 using Workflow 1
- Form 2 using Workflow 2

Project 2

- Form 1 using Workflow 2

- Form 2 using Workflow 1

### Project 3

- Form 3 using Workflow 3

The best order to set up Tracker is:

- Create Project(s)
- Create Form(s) and Fields
- Create Workflow(s)

The [next section](#) provides information for creating [Projects and Forms](#).

## Projects

One example of a project might be a line of products that are grouped together in some fashion (e.g. Project A, which includes Products 1A and 2A).



Projects are created in the [Manage Projects](#) section. Each project that is managed in Tracker will have one or more forms available for collecting the information needed to complete the project tasks or track issues associated with the project. If you are planning to only use one project, a "Default Project" is already configured for you to use. You can skip this section and move on to the [Forms](#) section.

When creating a new project, you will have the option to select an existing form to be associated with the new project. Selecting a form is not required (select <None> if you have not yet created the Form you want to use). If you have selected a form, you can also select the Workflow that should be used by the Form in this Project.

When creating new projects, keep in mind that each user needs to be a member of a user group that has access to at least one project in order to be able to login to Tracker.

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## Forms and Fields

A form is a set of fields that grouped together make up a record. Examples of forms are a bug report, enhancement request, change request, support or help desk issue or Knowledge Base article.



Forms are created in the [Manage Forms](#) section. If you are planning to only use a single form, a default form called "Record Form" is already configured for you to use. You can skip this section and move on to the [Fields](#) section.

When creating a form, you will have the option to select whether the form will be used with a Workflow. If you never intend to use a Workflow (states, transitions, automatic assignment and email notifications) with the form, select "No" for the **Used in Workflow** option. Selecting No will set all of the system-required fields (Product, Status, Reported By, Assignee) such that they are not visible to non-Admin users on the form being created. Select "Yes" for the **Used in Workflow** option if you ever intend to use this form with a Workflow. A Workflow allows you to set up states, transitions, automatic assignment and email notifications when records are submitted using the form. When "Yes" is selected for the Used in Workflow field, the **Workflow** field contains a list of available workflows that can be associated with the form you are creating. Select a Workflow for the Form. If you do not wish to select an existing workflow (e.g. you plan to create one for this form at a later time), you can select "Empty Workflow". Empty Workflow is a Workflow that has only one state called "Not Applicable", has no transitions or email rules and has TBD as a state manager for the "Not Applicable" state (the state manager cannot be changed). If you wish to create a new workflow for the form you are adding, select the "<Create New Workflow>" option.

## Fields

Select which existing fields should be available on each Form via the [Manage Forms](#) section. Every form will have the system required fields: PRN, Status, Reported By, Assigned To, Deleted and Product. These fields cannot be removed from any form. They can, however, be made so that they are not visible to any groups using the [Field Visibility](#) settings for each field. If No was selected for "Used In Workflow" option for the form, the fields Assignee, Status, Reported By and Product will be hidden on that form for all user groups (including the Admin user group).



Create any other fields that will be needed for each form. Fields can be added to more than one form. Fields are added in the [Manage Fields](#) section. After adding a field, you will have the option to select which forms in which the new field will appear.

When deciding which fields you need, keep in mind what kind of information you and other users and groups involved in the projects will want to track within a single record and in reports. For example, if you want to be able to track when a record was closed, you will want to have a "Close Date" field available for this piece of data to be captured.

Other questions that can help you identify the fields you need and the properties they should have are:

- What data type should the field be? For example, you could create a field called "Customer" in order to collect the name of the customer related to the record being reported. You could make this field a Text type field so that a name can be typed into the field. Alternatively, you could make this field a Pulldown menu where the menu options are pre-configured. Making this field a Pulldown field would prevent users from typing in different versions of the same choice and would make running reports simpler.
- Where should this field be displayed? You can choose whether each field is displayed on the Add, Submit, Edit and View Pages, Query and Home Page reports and email notifications.
- If this field is included on the Add or Submit Pages, should it be required? Making a field required ensures that a user adding a new record must enter information into the field before the new record can be submitted.
- If you are using multiple forms, will you need to link records created with one form to records created using another form? For example, let's say you have created a form for submitting support issues and another form for submitting development issues. You may want to be able to identify support issues that are related to development issues and vice versa. You can use [Link fields](#) to associate records of one form to another.

The next section provides information for creating [Workflows](#).



Central to a tracking process are the states that define the process. Each state encompasses its own rules regarding what action must be taken, by what individual, what data is involved, and where the request should go next within the process. The states and the behavior and rules associated with them are collectively called a workflow. A workflow is associated with a Form within a Project. Multiple workflows can be created. Each form can only use one workflow within a Project, but multiple forms can use the same workflow within a Project as in the Example below:

#### Project 1

- Form 1 using Workflow 1
- Form 2 using Workflow 1

#### Project 2

- Form 1 using Workflow 2
- Form 2 using Workflow 1



Workflows are created in the [Manage Workflows](#) section.

## States

In general, a state in the process can be defined as one or more actions that must be performed in a serial fashion by a single individual or a group. In most cases, it will be a single task that must be performed by team member. For example, a developer must fix a bug or a QA engineer must test a bug fix or a Support or Help Desk engineer must resolve an issue. By identifying the tasks that must be performed to process a request, you will have a good starting point for defining a workflow.

Once the states have been identified, you must determine the order in which they occur, and whether there are points where a record could be returned to a previous state. This information defines the state transitions. Transitions are paths that move records from one state to another. In the simplest case, the states are arranged in a single linear order, where at each point in the workflow, the only option (a single transition) is to cause the request to move to the next defined state. However, in some cases you may wish to give an individual the choice to move the record to one of several possible states using multiple transitions. This is called *branching*. Branching from one to several possible states is useful in cases where an individual is entrusted with this decision making capability. Tracker allows you to define any number of states in a workflow and also optionally an unlimited number of transitions to and from each state.



To add, remove or edit a state in a workflow, click on the **Admin** icon in the Button Bar and then click on the **Manage Workflows** button, then click on the **States** button. Detailed information on configuring workflow states can be found in the [Workflow States](#) Help section. To add, remove or edit transitions for a state, click on the **Admin** icon, click on the **Manage Workflows** button, click on the "+" icon to the left of the state, then click on the **Manage** link to the right of the **Transitions** heading.

## Transition State

When creating transitions, you need to decide what is the **New State** for the record. In other words, where does the record go when a particular transition is used to process it?

To help you develop transitions for each state, answer the following questions about each state (or step in your process):

- **Does this state have a path (transition) to another state(s)?**

If there is more than one possible state, add one transition for each possible new state or you may decide to create a single transition that will allow the end user to choose the next state from a list of possible states using the "Prompt with State Group" option. If there is a need to send a record back to the last state it was in, use the "<Previous State>" option.

- **Can an update transition occur for this state?**

This type of transition allows changes to be made to fields of the record without moving to another state or assigning to another user. Add a transition to be used to update a record in the state.

- **Is this a terminal state?**

A terminal state denotes an end to the workflow process. For example, the Closed state is a terminal state because records that are sent to this state will not be processed any further. A terminal state can also be signified by a state which does not have any transitions to other states.

## Transition Assignments

A **New Assignee** also needs to be defined for each transition. In some cases, it may be desirable to automatically assign the record to a particular individual or to a manager who will then assign it to a particular individual.

There are many options available to choose from when determining the New Assignee for a transition:

- **Should the record be assigned to an individual?**

Choosing to automatically assign a record to a particular user on a state transition has the advantage that no manager intervention is required, and the record becomes the user's responsibility as soon as possible. However, it does not allow for flexibility in scheduling resources - for example if you have several individuals who are capable of handling the task, only one of them can be assigned the job under this scheme.

In addition to choosing a specific user as the assignee, you can choose a new assignee from a list of users that are members of a particular user group (such as the "Developers" group) using the "Prompt

with User Group" option, assign the record to the "<Reporter>" (the user who added the record), or allow users to assign records to themselves (e.g. you can set up a "queue" in Tracker to allow users to pick up records from the queue and assign the record to his or herself using the "<LoginUser>" option). If you are sending a record back to a state which the record passed through earlier in the workflow, you can automatically assign the record to the user who last worked on the record in that particular state using the "<Last Assignee for New State>" or "Last Assignee for <State>" options.

- **Should the record be assigned to a manager?**

Assigning to the manager responsible for the state means that a manager must manually assign the record to another user for completion. This allows the manager to allocate resources more dynamically. One drawback to this to this scheme, is that it is difficult for someone to determine if the record is waiting to be assigned for completion, or if it has been assigned and is in the process of being handled.

- **Should the record be assigned to manager using a state?**

Another option is to define a separate state for the task of assigning the record to an individual for processing. That is, when a task is marked complete, it is assigned to a new state with a particular manager. The only task associated with the state is for the manager to assign it to somebody, at which point it moves to the state associated with actually handling the work. For example, rather than a single state called "Scheduled" which covers both assignment and completion of the task, you might define two states called "Scheduled" and "In Development". In this case the "Scheduled" state only covers the assignment, while the "In Development" state covers the actual work.

- **Assign to last assignee for new state**

In some cases, you may want to assign a record to a user who was previously assigned to it in a state earlier in the workflow process. This option is useful in situations where an approval decision is made. For example, when a QA engineer has to verify a fix. If the fix cannot be verified, the QA engineer may need to move the record back to the state where the fix is completed and assign the record to the original developer who completed the fix.

- **Are there cases where a record does not need to be re-assigned?**

If the transition is to be used for updating a record and the assignee should not change, choose the "<Same Assignee>" option.

## Transition Data

Another important issue is determining what data should be entered by a user when he/she has completed a task. This information, known as **Task Fields** is kept in the data form and generally is either used to process a state further down the workflow or to log information about how the user completed the task.

Rather than just present the entire data form for editing to the user when marking the task complete, only the necessary information should be presented. This eliminates the need for each user to know what fields are important for each state transition. Tracker allows this via the Task operation. This operation presents the user with only the fields defined for the particular state transition and can automatically change the record state and assignee or prompt the user to choose the next state or assignee.



Admin

To define Task Fields for each state transition:

1. Click on the **Admin** icon on the Button Bar
2. Click on the **Managing Workflows** button
3. Select the desired workflow in the **Workflows** pulldown at the top. The page will be refreshed to show the properties of the selected workflow
4. Click on the "+" icon to the left of **Available States** to expand the list of states in the selected workflow.
5. Click on the "+" icon to the left of the state that contains the transition you wish to modify
6. Click on the **Manage** link to the right of **Transitions**
7. Each transition listed for the state has a Task Fields button. Click on the **Task Fields** button to define the set of fields to present for each transition.

Use the following questions to help you define Task Fields for each transition:

- **Which fields need to be filled in or updated when the record is processed by this transition?**  
For fields that need to be filled in or updated, decide whether the fields should be "Optional" for the user to fill in or "Required" using the **Input Type** option.
- **Are there fields that should be displayed for the users reference during the Task operation?**  
Task fields can be set as "Read Only" so the user can refer to the contents of the field, but cannot make changes to the field using the **Input Type** option.
- **Are there fields that should be initialized?**  
There may be cases where you wish to have fields reset to their default value during the Task operation or you may want a Date field to be initialized with the current date and time using the **Initialize (Reset)** option. If you wish to automatically capture a date and time in a field (e.g. a "Close Date" or "Fixed Date"), set Initialize (Reset) to "Yes" for the Date field.
- **Should an Annotation to TextArea fields be set to happen automatically?**  
An Annotation that includes a date and time stamp and the User ID of the user who modified the field can be set to occur automatically if desired using the **Annotate** option.
- **Should the existing data in TextArea fields be preserved?**  
The **Append** option allows you to define whether any data added to TextArea fields is appended to the field vs. allowing a user to modify any part of the field's contents.

## Additional Options for Transitions

Additional options include choosing which transitions are visible to user groups, whether a history comment should be set, whether to allow users to add/remove attachments and source code files and whether to allow a record to be cloned during the Task operation.

To help decide which additional options are appropriate for each transition:

- **Do you wish to have users explain what they are doing to the record?**  
If so, you may wish to make the History Comment "Required" for a transition. Any information typed into the History Comment field will be saved in the Record History.

- **Should users be allowed to add/remove Attachments or Source Code Files when using a particular transition?**

Adding attachments might be necessary in cases where the Reporter is adding more information to a record. Adding Source Code Files might be necessary in cases where a Developer is marking a record as fixed.

- **Should a record be cloned at a particular step in the workflow?**

Cloning creates a duplicate of a record. This is useful in cases where you want to link records that report a similar issue or link records that report the same issue in different products or projects.

- **Which users and user groups should be able to see this transition?**

The "Make Visible To Users/User Groups" option allows you to limit which users or groups can access a transition. This is useful in cases where you have multiple users that could process a record in a single state. For example, let's say you would like to allow the "Reporter" to add more detail to a record while it is assigned to a Developer in the In Development state. You could create two transitions for the In Development state:

1. One called "Mark Fixed" that the Developer will use to reflect that he/she has completed the development for the record. This transition is only visible to the Developers group.
2. Another called "Update" that the Reporter can use to add more information to the record while it is In Development. This transition is only visible to the "Reporter".

- **For which forms should this transition be available?**

If a particular workflow is being used with multiple forms, you can choose which forms the transition will be available for. In other words, there may be some transitions that are not relevant to all forms.

More information about Transitions and Task Fields can be found in the [Workflow Transitions](#) Help section.

Note that if all users are sophisticated enough to understand the entire workflow, it may be acceptable or preferable to have all users to mark a task complete by using the Edit operation instead, as this allows full access to all fields of the data record.

The next section provides information about [Email Notification](#).



An important aid to timely and smooth processing of the defect tracking process is automatic notification of events. Standard Internet email is the most widely accepted form of notification.

There are several events that could trigger notification:

- Adding a record
- Editing a record
- Deleting a record
- Performing the Task operation on a record
- Change of record state
- Change of assignment

For each of these events, a set of users may be affected. When a record is added, the following users may be interested:

- The user who is currently assigned to the record
- The user who reported the record
- The manager assigned to the state of the record when it is added
- User Groups within your database

When an edit or task operation is performed on a record, the following users may be interested:

- The user who is currently assigned to the record
- The individual assigned to the record if the Assigned To field is changed during the Edit / Task operation.
- The individual who was the previous assignee if the Assigned To field is changed during the Edit / Task operation.
- The individual who reported the record.
- The manager assigned to the process state of the record when the Edit / Task operation is performed.
- The manager assigned to the new process state of the record if the State field is changed during the Edit / Task operation.
- The manager assigned to the previous process state of the record if the State field is changed during the Edit / Task operation.
- User Groups within your database

When a record is deleted, the following users may be interested:

- The individual who is currently assigned to the record.
- The individual who reported the record.
- The manager assigned to the process state of the record when it is deleted.
- User Groups within your database

On a change of record state, the following users may be interested:

- The individual who is currently assigned to the record.
- The individual who reported the record.
- The manager assigned to the new process state.
- The manager assigned to the original process state.
- User Groups within your database

On a change of record assignment, the following users may be interested:

- The individual the record is being assigned to.
- The individual the record was assigned to before the change of assignment.
- The individual who reported the record.
- The manager assigned to the current process state of the record.
- User Groups within your database

### **Unregistered Users**

Tracker can be configured to send email notification messages to unregistered users who submit records via the [Submit Page](#) or via [Email](#). Details about configuring notifications for unregistered users can be found in the [General Preferences](#) section.

Determining which users and under what events notification should occur is really a trial-and-error process determined by the personal working habits and preferences of users of the system. The issue should be discussed and tested with the users in your organization until consensus is reached on the desired behavior.

Email Rules are configured for each workflow and can be set differently based on each option menu item in a pulldown if desired. Details on setting your email notification rules can be found in the [Manage Workflows](#) Help section.

---

## **Alerts**

If you have purchased Tracker Enterprise Edition, the Alerts feature is another means of generating email notifications. Alerts are notifications that can be triggered relative to a date field in a record or based on a lack of change of status.

Alerts can be set differently for each individual record if desired. Alerts can also be set based on:

- The form that was used to submit the record
- Which item was selected in a particular pulldown
- The transition used to process the record

Alerts can be set to notify the following users:

- The user who is currently assigned to the record
- The user who reported the record

- The manager assigned to the state of the record when it is added
- Other Users or User Groups within your database

Information about customizing Alerts can be found in the [Alerts](#) Help section.

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## Discussion

If you have purchased Tracker Enterprise Edition, the Discussion feature is a message board or news group feature where your users can have conversations related to a record. These conversations can happen in parallel to the record moving through a workflow. Notification messages can be sent for the following actions:

- Users or user groups can be invited to participate in a discussion via an email notification
- Users can subscribe to discussion threads so that they receive an email notification when a new message is posted to a thread

More detail about Discussion notifications can be found in the [Discussion](#) section.

The next section provides more information about [Security](#).



The basic purpose of security is to limit access to a resource on a per user basis. Resources may either be operations, or data. For example, you may wish to restrict some users from editing records, and other from viewing only certain records.

When used to limit access to operations, security can help to ensure that the desired workflow chain is maintained. For example, by removing the option to edit all fields in the data record, users can be prevented from mistakenly entering the wrong information or altering previously entered information.

Security can also be used to help protect data, allowing only select groups of individuals to operate on particular records. This is useful if you wish to prevent a group of users from viewing records that are of no concern to them, for example customers or users working on different projects.

## User Groups and Privileges

Tracker allows you to set security for both operations and data using a User Group security model similar to that used by Microsoft Windows Server. You can create any number of user groups and assign access to operations and other privileges to each group. Individual users can then be assigned to groups. Being a member of a group means that you obtain all the rights and privileges assigned to the group. For example, to be able to access the Admin operations, you must be a member of a group(s) that has the Admin privilege assigned to it.

Information about creating and managing User Groups can be found in the [User Administration - Groups](#) section.

Information about user group privileges can be found in the [User Administration - Privileges](#) section.

## Project Visibility

Tracker allows projects to be set such that they are visible to certain user groups via the [Manage Projects](#) section. This allows you to restrict users such that they can only add and access records for projects in which they are involved.

## Record Visibility

Record Visibility allows you to restrict the individual records a user can access based on their user group membership. Record Visibility is useful when you have external users (e.g. customers, vendors, partners) who will be accessing Tracker and you want to keep Company A from accessing Company B's records, while still allowing internal users to access records for all customers. Information on configuring Record Visibility can be found in the [General Preferences](#) section.

## Field Visibility

Field Visibility is the feature that allows you to configure which fields are available on the pages in Tracker for each user group. For example, let's say there are some fields that you only want internal users to be able to see when they go to the View page for a record. Field Visibility allows you to choose which fields are displayed in the different areas such as Add, View, Edit, Query/Home reports, email notification messages. Information about configuring Field Visibility can be found in the [Manage Fields](#) section.

The next section provides information to help you [put it all together](#).



Once you have determined how to handle the issues involved in a defect tracking process, you can implement it. There are many ways to do this, two of the largest challenges being maintaining the request information, and dissemination of the current state of the process to the individuals involved in making it happen.

Tracker provides a framework to implement your defect tracking process, and in many ways can be thought of as a programmable general workflow engine. All the states, rules, and individuals that as a whole define your process can be entered into Tracker. Tracker makes it easy for all your users to follow the correct process and access real-time information about the state of any record in the system.

The following sections discuss in some detail the sample templates provided with Tracker and the issue tracking process supported by each:

[Product Development](#)

[Web Site Development](#)

[Knowledge Base](#)

[Help Desk](#)

[Support](#)

[Base](#)

[Change Management](#)

## Overview

The Product Development template supports a typical product development process. Typical of this process is the bundling of numerous bug fixes into a particular product release. This model assumes the following organizations are involved in the defect tracking process:

### Development

Responsible for performing development tasks necessary to handle the request.

### QA

Verifies that the request has been successfully implemented by the Development organization.

### Build

Places the updated files into the final product package.

---

## Projects

A default project called Product Development is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

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## Forms

A default form called "Issue" is available in this template, is associated with the "Product Development" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Issue form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an asterisk are required by the system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the record is created.
<b>Title</b>	A one line text summary of the issue being reported. Set at the time the record is created.
<b>Product*</b>	Identifies the product for which the record has been reported. Set at the time the record is created.
<b>Platform</b>	Describes the hardware or software platform where the issue occurs. Examples are the operating system (e.g. Windows 95), or the CPU (e.g. Intel Compatible). Set at the time the record is created.
<b>Reported In Version</b>	Version number of the product where the issue occurs. Set at the time the record is created.
<b>Request Type</b>	Classifies the record. Possible values are: Bug, Contract Requirement, Customer Feedback, Customer Problem, Enhancement. Set at the time the record is created.
<b>Severity</b>	Describes how serious the problem is. Set at the time the record is created.
<b>Description</b>	Full description of the problem. Ideally describes the nature of the problem and how to reproduce the behavior. Set at the time the record is created.
<b>Reported By*</b>	Name of the user that reported the problem. Initially set to the name of the current user logged in. Set at the time the record is created.
<b>Date Reported</b>	The date the record was created. Automatically initialized, and set at the time the record is created.
<b>Workaround</b>	Describes how to work around the reported problem. Set at the time the record is created.
<b>Status*</b>	Current state of the record. Changes as the record is processed through the workflow.
<b>Substatus</b>	Describes the condition of the record in the current state. Possible values are: None, In Progress. Optionally set by each user while processing the record.
<b>Assigned To*</b>	User the record is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Estimated Size</b>	Used to enter an estimated amount of time it will take for a developer to fix the problem.
<b>Planned for Version</b>	Identifies the release number of the product in which the fix for the issue is planned to be included.
<b>Released in Version</b>	Identifies the release number of the product that the fix for the issue will be included in.
<b>Fix Date</b>	Date when the issue was fixed. Set by Development when the problem is fixed. Automatically initialized to the current date/time.
<b>Fix Detail</b>	A Description of the action taken by a developer to fix the problem. Set by Development when the problem is fixed.
<b>Test Date</b>	Date when the fix was tested. Set by QA when the fix for the problem is tested. Automatically initialized to the current date/time.
<b>Test Description</b>	A Description of the action taken by a QA Engineer to test the fix. Set by QA when the fix for the problem is tested.
<b>Priority</b>	Describes the relative importance of handling this record compared to other records entered in the system.
<b>Close Date</b>	Date when the record was closed. Set by Process Manager when no development work will be done for the record. Automatically initialized to the current date/time.
<b>Close Detail</b>	A Description of the reason a record will be closed. Set by Process Manager when no development work will be done for the record.

<b>Defer Reason</b>	Describes the reason a record will not be worked on until a later date.
<b>Duplicate Record #</b>	Lists the record number of another previously-entered record in the database which describes the same problem.
<b>Deleted*</b>	Denotes whether the record has been deleted.

---

## Workflows

It is assumed that records will be processed and moved through the workflow process by using the Task operation. A default workflow called "Product Issue Process" is available in this template and is associated with the "Issue" Form and is in use in the "Product Development" Project. You can customize the Product Issue Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Reported

When a record is created, it is set to the state Reported and assigned to the Process Manager (process\_mgr). It is assumed that the Process Manager is responsible for looking at all incoming records and deciding how to process each record from a list of possible workflow paths. The Process Manager can choose one of the following:

- Start the process for the record by selecting the transition called **Schedule**. This transition will assign the record to the Development Manager (dev\_mgr) and place the record in the Scheduled state. The Process Manager can also enter a Planned for Version and Priority for the record when choosing this transition.
- Defer the processing of the record by selecting the transition called **Defer**. This transition will place the record in the Deferred state and assign it to the state manager of that state (process\_mgr). The Process Manager can review deferred records at a later time and decide whether processing will resume. The Process Manager must enter a Defer Reason and has the option of entering a Planned for Version when choosing this transition.
- Close the record by selecting the transition called **Close**. This transition will place the record in the Closed state and assign it to TBD (no one - since this record will not be processed any further). The Process Manager will be required to enter a date in the Close Date field and enter a reason the record was closed in the Close Detail field.
- Mark the record as a duplicate of another record by selecting the transition called **Mark Duplicate**. This transition will place the record in the Duplicate State and assign it to TBD (no one - since this record will not be processed any further). The Process Manager will be required to enter the record number of the original record that describes the same problem.

This is implemented by:

### Workflow Properties

- Defining Reported as the Default Add State when a record is added
- Assigning the process\_mgr user as the manager for the Reported and Deferred states
- Assigning dev\_mgr as the manager for the Scheduled state

## Transitions

- Defining transitions to move a record to the Scheduled and Deferred states where the assignee is the State Manager for each respective state.
- Defining transitions to move a record to the Closed and Mark Duplicate states where the assignee is TBD for each transition.

## Task Fields

- Configuring Planned for Version and Priority to be presented as optional during the task operation for the transition to the Scheduled state.
- Configuring Defer Reason (required) and Planned for Version (optional) to be presented during the task operation for the transition to the Deferred state.
- Configuring Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Duplicate Record # (required) to be presented during the task operation for the transition to the Mark Duplicate state.

### 2. State 2 - Scheduled

The Development Manager (dev\_mgr) is assumed to be a manager responsible for assigning tasks to the developers for resolution. The Development Manager uses the transition **Assign to Developer** to assign the record to a member of the Developers user group. This places the record in the In Development state. The Development Manager can also decide to defer a record by choosing the **Defer** transition, which will place the record in the Deferred state and assign it to the Process Manager (process\_mgr).

This is implemented by:

## Transitions

- Defining a transition to move a record to the In Development state with the assignee to be chosen from a list of developers (User Group called "Developers")
- Defining a transition to move a record to the Deferred state with the state manager as the assignee

## Task Fields

- Configuring Defer Reason (required) and Planned for Version (optional) to be presented during the task operation for the transition to the Deferred state

### 3. State 3 - In Development

The Developer (dev\_one) assigned to the record makes the changes necessary to address the problem and marks the task complete by selecting the transition **Mark Fixed**. This transition allows the Developer to enter a description and date of the fix, advances the state of the record to Fixed, and assigns the record to the QA Manager (qa\_mgr).

This is implemented by:

### Workflow Properties

- Defining the qa\_mgr as the manager for the Fixed state

### Transitions

- Defining a transition to move a record to the Fixed state where the assignee is the State Manager

### Task Fields

- Configuring the Fix Date (read only and initialized) and Fix Detail (required) to be presented during the Task operation for the transition to the Fixed state. The Description field has been configured as a read only task field for the user to reference when selecting this transition.

#### 4. State 4 - Fixed

Once the record has entered the Fixed state, the QA Manager (qa\_mgr) assigns the record to the QA Engineer (qa\_one), a member of the QA user group, and advances the state to In Test by selecting the transition **Assign to QA Engineer**.

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Test state with the assignee to be chosen from a list of QA Engineers (User Group called "QA")

#### 5. State 5 - In Test

The QA Engineer (qa\_one) verifies that the issue has been resolved, and then uses the transition called **Mark Tested** to advance the record to Tested and assigns the record to the Build Manager (bld\_mgr). If an issue has not been resolved and needs to be returned to Development, the QA Engineer can move the record back to the In Development state using the transition **Reject**, which will assign the record to the developer who worked on the record. For each of these possible paths, the QA Engineer enters information in the Test Date and Test Description fields.

This is implemented by:

### Workflow Properties

- Configuring bld\_mgr to be the manager of the Tested state

### Transitions

- Defining a transition to move a record to the Tested state where the assignee is the state manager
- Creating a transition to move a record to the In Development state or <Previous State> where the assignee is the Last Assignee for the new state.

### Task Fields

- Configuring Test Date (read only and initialized) and Test Description (required) to be presented during the Task operation for the transitions to the In Development and Tested states. The Fix Detail field is presented as a read only task field for the QA Engineer to reference when selecting this transition.

## 6. State 6 - Tested

The Build Manager (bld\_mgr) user is assumed to be the user in charge of packaging the product for release, and responsible for ensuring that all the desired fixes are included in the release. The Build Manager does what is necessary to make sure that the fix for the record is included in the release, enters the released in version for the record, then advances the state of the record to "Released" using the transition called **Release**.

This is implemented by:

### Transitions

- Defining a transition to move the record to the Released state where the assignee is TBD. TBD ("no one") is selected since the release is the last step in the processing of the record.

### Task Fields

- Configuring Released in Version (required) as a field to be presented during the task operation for the transition to the Released state. The Planned for Version field is presented as a read only task field for the Build Manager to reference when choosing this transition.

## 7. State 7 - Released

This state indicates that processing of the record is complete.

## 8. State 8 - Closed

This state indicates that the record will not be processed.

## 9. State 9 - Deferred

This state indicates the decision on whether or not to process the record has been deferred until a future date. The Process Manager can update a record in this state by using the transition called **Update**. The Update transition will keep the record in the Deferred state and assigned to the state manager (process\_mgr). The fields Defer Reason and Priority are presented as optional fields during the task operation. The Process Manager is required to enter a history comment to describe what was changed within the record when using the Update transition.

The Process Manager can decide to begin processing a record by choosing the **Schedule** transition, which will place the record in the Scheduled state and assign it to the State Manager (dev\_mgr). The Process Manager can set the Planned for Version and Priority fields when choosing this transition.

This is implemented by:

### Transitions

- Defining a transition called Update with Deferred set as the New State, "Same Assignee" selected as the New Assignee, and history comment required
- Creating a transition to move the record to the Scheduled state and assign it to the state manager

### Task Fields

- Configuring Defer Reason and Priority to be presented during the task operation for the transition to update a deferred record
- Configuring Planned for Version and Priority to be presented during the task operation for the transition to the Scheduled state.

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## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

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## Email Notification

The Product Development template is set up to notify users as follows:

### On Add or Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of State to Released, Deferred, Duplicate or Closed

The user who reported the record is notified when a record is moved to a state where processing is stopped

### On Change of Assignment

Both the current assignee and the manager for the current state of the record are notified

---

## Security

The Product Development template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing fields within the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.



## Overview

The Web Site Development template supports a traditional web site development process. Typical of this process is the immediate posting of bug fixes to the web site being developed and maintained. This model assumes the follow organizations are involved in the defect tracking process:

### Development

Responsible for performing development tasks necessary to handle the request.

### QA

Verifies that the request has been successfully implemented by the Development organization.

### Build

Places the updated files onto the live server.

---

## Projects

A default project called "Web Site Development" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

---

## Forms

A default form called "Issue" is available in this template, is associated with the "Web Site Development" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Issue form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an asterisk are required by the system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the record is created.
<b>Title</b>	A one line text summary of the problem. Set at the time the record is created.
<b>Product*</b>	Identifies the product for which the record has been reported. Set at the time the record is created.
<b>Browser</b>	Identifies the browser type for which the record has been reported. Set at the time the record is created.
<b>Platform</b>	Describes the hardware or software platform where the problem occurs. Examples are the operating system (e.g. Windows 95), or the CPU (e.g. Intel Compatible). Set at the time the record is created.
<b>Problem URL</b>	URL of the web page where the problem was found. Set at the time the record is created.
<b>Request Type</b>	Classifies the record. Possible values are: Bug, Contract Requirement, Customer Feedback, Customer Problem, Enhancement. Set at the time the record is created.
<b>Severity</b>	Describes how serious the problem is. Set at the time the record is created.
<b>Description</b>	Full description of the problem. Ideally describes the nature of the problem and how to reproduce the behavior. Set at the time the record is created.
<b>Reported By*</b>	Name of the user that reported the record. Initially set to the name of the current user logged in. Set at the time the record is created.
<b>Date Reported</b>	The date the record was created. Automatically initialized, and set at the time the record is created.
<b>Workaround</b>	Describes how to work around the reported problem. Set at the time the record is created.
<b>Status*</b>	Current state of the record. Changes as the record is processed through the workflow.
<b>Substatus</b>	Describes the condition of the record in the current state. Possible values are: None, In Progress. Optionally set by each user while processing the record.
<b>Assigned To*</b>	User the record is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Estimated Size</b>	Used to enter an estimated amount of time it will take for a developer to fix the problem.
<b>Fix Date</b>	Date when the record was fixed. Set by Development when the problem is fixed. Automatically initialized to the current date/time.
<b>Fix Detail</b>	A Description of the action taken by a developer to fix the problem. Set by Development when the problem is fixed.
<b>Date Tested</b>	Date when the fix was tested. Set by QA when the fix for the problem is tested. Automatically initialized to the current date/time.
<b>Test Description</b>	A Description of the action taken by a QA Engineer to test the fix. Set by QA when the fix for the fix is tested.
<b>Test URL</b>	A URL where the fix can be tested. Set by Developer when the problem is fixed.
<b>Priority</b>	Describes the relative importance of handling this record compared to other records entered in the system.
<b>Close Date</b>	Date when the record was closed. Set by Process Manager when no development work will be done on a record. Automatically initialized to the current date/time.
<b>Close Detail</b>	A Description of the reason for closing a record. Set by the Process Manager when no development work will be done on a record.

<b>Defer Reason</b>	Describes the reason a record will not be worked on until a later date.
<b>Duplicate Record #</b>	Lists the record number of another previously-entered record in the database which describes the same problem.
<b>Date Released</b>	Date when the fix for the record was released. Set by the Build Manager when the fix for the problem is released. Automatically initialized to the current date/time.
<b>Deleted*</b>	Denotes whether the record has been deleted.

---

## Workflows

It is assumed that records will be processed and moved through the workflow process by using the Task operation. A default workflow called "Web Site Issue Process" is available in this template and is associated with the "Issue" Form and is in use in the "Web Site Development" Project. You can customize the Web Site Issue Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Reported

When a record is created, it is set to the state Reported, and assigned to the Process Manager (process\_mgr). It is assumed that the Process Manager is responsible for looking at all incoming records and deciding how to process each one from a list of possible workflow paths. The Process Manager can choose one of the following:

- Start the process for the record by selecting the transition called **Schedule**. This transition will assign the record to the Development Manager (dev\_mgr) and place the record in the Scheduled state. The Process Manager can also enter a Priority for the record when choosing this transition.
- Defer the processing of the record by selecting the transition called **Defer**. This transition will place the record in the Deferred state and assign it to the state manager of that state (process\_mgr). The Process Manager can review deferred records at a later time and decide whether processing will resume.
- Close the record by selecting the transition called **Close**. This transition will place the record in the Closed state and assign it to TBD (no one - since this record will not be processed any further). The Process Manager will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.
- Mark the record as a duplicate of another record by selecting the transition called **Mark Duplicate**. This transition will place the record in the Duplicate State and assign it to TBD (no one - since this record will not be processed any further). The Process Manager will be required to enter the record number of the original record that describes the same problem.

This is implemented by:

### Workflow Properties

- Defining Reported as the Default Add State when a record is added
- Assigning the process\_mgr user as the manager for the Reported and Deferred states
- Assigning dev\_mgr as the manager for the Scheduled state

### Transitions

- Defining transitions to move a record to the Scheduled and Deferred states where the assignee is the State Manager for each respective state.
- Defining transitions to move a record to the Closed and Mark Duplicate states where the assignee is TBD for each transition.

### Task Fields

- Configuring Priority (optional) to be presented during the task operation for the transition to the Scheduled state.
- Configuring Defer Reason (required) to be presented during the task operation for the transition to the Deferred state.
- Configuring Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Duplicate Record # (required) to be presented during the task operation for the transition to the Mark Duplicate state.

## 2. State 2 - Scheduled

The Development Manager (dev\_mgr) is assumed to be a manager responsible for assigning tasks to the developers for resolution. The Development Manager uses the transition **Assign to Developer** to assign the record to a developer (dev\_one), a member of the "Developers" user group. This places the record in the In Development state. The Development Manager can also decide to defer a record by choosing the **Defer** transition, which will place the record in the Deferred state and assign it to the Process Manager (process\_mgr).

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Development state with the assignee to be chosen from a list of developers (User Group called "Developers")
- Defining a transition to move a record to the Deferred state with the state manager as the assignee

### Task Fields

- Configuring Defer Reason (required) to be presented during the task operation for the transition to the Deferred state

## 3. State 3 - In Development

The Developer (dev\_one) assigned to the record makes the changes necessary to address the problem and marks the task complete using the transition called **Mark Fixed**. This transition allows the Developer to enter a description and date of the fix as well as a URL to be used by QA to test the fix, advances the state of the record to Fixed, and assigns the record to the QA Manager (qa\_mgr).

This is implemented by:

## Workflow Properties

- Defining the qa\_mgr as the manager for the Fixed state

## Transitions

- Defining a transition to move a record to the Fixed state where the assignee is the State Manager

## Task Fields

- Configuring the Fix Date (read only and initialized), Fix Detail (required), and Test URL (optional) to be presented during the Task operation for the transition to the Fixed state. The Description field is presented as a read only task field for the Developer's reference when choosing this transition.

### 4. State 4 - Fixed

Once the record has entered the Fixed state, the QA Manager (qa\_mgr) assigns the record to the QA Engineer (qa\_one), a member of the QA user group, and advances the state to In Test by using the transition called **Assign to QA Engineer**.

This is implemented by:

## Transitions

- Defining a transition to move a record to the In Test state with the assignee to be chosen from a list of QA Engineers (User Group called "QA")

### 5. State 5 - In Test

The QA Engineer (qa\_one) verifies that the problem has been resolved, and then uses the transition **Mark Tested** to advance the record to the Tested state and assigns the record to the Build Manager (bld\_mgr). If a problem has not been resolved and needs to be returned to Development, the QA Engineer can move the record back to the In Development state and assign it to the developer who worked on the record by using the **Reject** transition. For each of these possible paths, the QA Engineer enters information in the Test Description and Test URL fields. The Test Date is automatically updated.

This is implemented by:

## Workflow Properties

- Configuring bld\_mgr to be the manager of the Tested state

## Transitions

- Defining a transition to move a record to the Tested state where the assignee is the state

manager

- Creating a transition to move a record to the In Development state or <Previous State> where the assignee is the Last Assignee for the New State.

### Task Fields

- Configuring Test Date (read only and initialized), Test Description (required), and Test URL (optional) to be presented during the Task operation for the transitions to the In Development and Tested states. The Fix Detail field is presented as a read only task field for the QA Engineer to reference when selecting this transition.

### 6. State 6 - Tested

The Build Manager (bld\_mgr) user is assumed to be the user in charge of packaging the product for release, and responsible for ensuring that all the desired fixes are included in the release. The Build Manager does what is necessary to make sure that the fix for the record is included in the release, then advances the state of the record to Released using the transition **Release**. The Date Released field is automatically updated.

This is implemented by:

### Transitions

- Defining a transition to move the record to the Released state where the assignee is TBD ("no one" as the processing for this record has been completed).

### Task Fields

- Configuring Date Released (read only and initialized) as a field to be presented during the task operation for the transition to the Released state

### 7. State 7 - Released

This state indicates that processing of the record is complete.

### 8. State 8 - Closed

This state indicates that the record will not be processed.

### 9. State 9 - Deferred

This state indicates the decision on whether or not to process the record has been deferred until a future date. The Process Manager can update a record in this state by using the **Update** transition. The Update transition will keep the record in the Deferred state and assigned to the same user (process\_mgr). The fields Defer Reason and Priority are presented as optional fields during the task operation. The Process Manager is required to enter a history comment to describe what was changed within the record when using the Update transition.

The Process Manager can decide to begin processing a record by choosing the Schedule transition, which will place the record in the Scheduled state and assign it to the State Manager (dev\_mgr). The

Process Manager can set the Priority field when choosing this transition.

This is implemented by:

### Transitions

- Defining a transition called Update with Deferred selected as the New State (same state), <Same Assignee> set as the New Assignee and history comment required
- Creating a transition to move the record to the Scheduled state and assign it to the state manager

### Task Fields

- Configuring Defer Reason and Priority to be presented during the task operation for the transition to update a deferred record
  - Configuring Priority to be presented during the task operation for the Schedule transition
- 

## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

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## Email Notification

The Web Site Development template is set up to notify users as follows:

### On Add or Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of State to Released, Deferred, Duplicate or Closed

The user who reported the record is notified when a record is moved to a state where processing is stopped

### On Change of Assignment

Both the current assignee and the manager for the current state of the record are notified

---

## Security

The Web Site Development template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under

General Preferences in the Administration Task page to No.

In addition, the privileges related to editing the field of the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.

## Overview

The Knowledge Base template supports a process to compose, review and publish Knowledge Base articles that are searchable by end users. Typical of this process is the immediate posting of articles so end users can access the most up to date information. This model assumes the follow organizations are involved in the process:

### Support

Responsible for composing, publishing, and maintaining the Knowledge Base articles

### Development

Responsible for reviewing the articles for technical accuracy

### Publications

Responsible for reviewing articles for consistency with other documentation

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## Projects

A default project called "Knowledge Base" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

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## Forms

A default form called "Article" is available in this template, is associated with the "Knowledge Base" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

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## Fields

The Article form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an asterisk are required by the system and cannot be removed from any form(s).

<b>Article ID*</b>	Numeric record identifier. Assigned at the time the article is created.
<b>Title</b>	A one line text summary of the article. Set at the time the article is created.
<b>Article Type</b>	Classifies the article. Possible values are: Defect, Hot Fix, Tech Note, and Unknown. Set at the time the article is created.
<b>Product*</b>	Identifies the product for which the article has been composed. Set at the time the article is created.
<b>Version</b>	Identifies the version of the product to which the article pertains. Set at the time the article is created.
<b>Oldest Version</b>	Identifies the oldest article in a range of versions to which the article is applicable. Values displayed in this field depend on the value selected in the Version field. Set at the time the article is created.
<b>Newest Version</b>	Identifies the newest article in a range of versions to which the article is applicable. Values displayed in this field depend on the value selected in the Version field. Set at the time the article is created.
<b>Severity</b>	Indicates the level of severity of the article's subject. Set at the time the article is created.
<b>Description</b>	Full details of the article. Ideally describes the nature of an issue or a procedure and how to resolve it or perform a set of steps. Set at the time the article is created.
<b>Workaround</b>	Describes how to work around the problem described in the article. Set at the time the article is created.
<b>Publication Date</b>	The date the article was published. Automatically initialized, and set at the time the record is published as part of the workflow.
<b>Status*</b>	Current state of the article. Changes as the record is processed through the workflow.
<b>Assigned To*</b>	User the article is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Author*</b>	Name of the user that composed the article. Initially set to the name of the current user logged in. Set at the time the article is created.
<b>First Draft Date</b>	The date the article was created. Automatically initialized, and set at the time the article is created.
<b>Dev Comments</b>	Describes the comments made by the Developer reviewing the article. Set after review by a member of the Developers group.
<b>Pubs Comments</b>	Describes the comments made by the Publications user reviewing the article. Set after review by a member of the Publications group.
<b>Support Notes</b>	Describes the response from the Author (usually a member of the Support group) about the comments resulting from the reviews made by the Development and Publications groups. Set after review by the Author.
<b>Archive Date</b>	Date when the record was removed from the Knowledge Base. Set by Support when the article has become obsolete or was replaced by a newer article. Automatically initialized to the current date/time.
<b>Deleted*</b>	Denotes whether the article has been deleted.

## Dependent Pulldowns

The pulldown fields Oldest Version and Newest Version are dependent on the pulldown field called Version to create a range that describes which versions are affected by the content of an article.

The Version field has the option menu values:

- Unknown
- Version 1
- Version 2
- Multiple Versions

Oldest Version has the option menu values:

- Unknown
- 1.0.0
- 1.0.1
- 1.5.0
- 2.0.0
- 2.0.1
- 2.0.2

Newest Version has the option menu values:

- Unknown
- 1.0.0
- 1.0.1
- 1.5.0
- 2.0.0
- 2.0.1
- 2.0.2
- Latest Release

The examples below illustrate the dependencies between Version and the Oldest Version and Newest Version:

**Article content applies to Versions 1.x only**

Version field set to "Version 1". Selecting this value for the Version field will result in the Oldest Version and Newest Version fields only displaying those option menu values that start with "1".

Oldest Version set to "1.0.0"

Newest Version set to "1.5.0"

**Article content applies to Versions 1.5.0 through latest version**

Version field set to "Multiple Versions". Selecting this value for the Version field will result in the Oldest and Newest Version fields displaying all possible values.

Oldest Version set to "1.5.0"

Newest Version set to "Latest Release"

Details on setting up dependencies between pulldown fields can be found in the [Customizing Pulldown Dependencies](#) section of the Admin Guide.

## Workflows

It is assumed that records will be processed and moved through the workflow process by using the Task operation. A default workflow called "KB Article Process" is available in this template and is associated with the "Article" Form and is in use in the "Knowledge Base" Project. You can customize the KB Article Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Pending Dev Review

When an article is created, it is set to the state Pending Dev Review, and assigned to the Development Manager (dev\_mgr). It is assumed that the Development Manager is responsible for assigning the article to a Developer (a member of the "Developers" user group) to review and comment on the article's technical accuracy. The Development Manager uses the transition called **Assign to Developer For Review**, which sets the article's state to In Dev Review and prompts the Development Manager to select a user from the list of members of the Developers user group.

This is implemented by:

#### Workflow Properties

- Defining Pending Dev Review as the Default Add State when an article is added
- Assigning the dev\_mgr user as the manager for the Pending Dev Review state

#### Transitions

- Defining a transition to move an article to the In Dev Review state where the assignee is the Developer selected by dev\_mgr during the Task operation

### 2. State 2 - In Dev Review

The Developer (dev\_one) reviews the article for technical accuracy, then decides whether to approve or reject the article by choosing the corresponding transition. To approve the article, dev\_one selects the transition **Approve Article** and provides any desired comments in the Dev Comments field. This results in the article being placed in the Pending Pubs Review state and is assigned to the Publications Manager. To reject the article, dev\_one selects the transition **Reject Article** and must provide comments to describe why the article was rejected in the Dev Comments field. This results in the article being placed in the Rejected By Dev state and assigned to the Author (Reporter).

This is implemented by:

#### Workflow Properties

- Selecting Pubs Manager as the state manager for the Pending Pubs Review state

#### Transitions

- Defining a transition to move a record to the Pending Pubs review state with the assignee set to be the state manager
- Defining a transition to move a record to the Rejected By Dev state with the <Reporter> set as the new assignee

### Task Fields

- Configuring Dev Comments (optional) to be presented during the task operation for the transition to the Pending Pubs Review state
- Configuring Dev Comments (required) to be presented during the task operation for the transition to the Rejected By Dev state

### 3. State 3 - Pending Pubs Review

The Publications Manager (pubs\_mgr) is responsible for assigning the article to a Publications Reviewer (a member of the Publications user group) to review and comment on the article so that it is consistent with all other documentation. The Publications Manager uses the transition called **Assign to Pubs Reviewer**, which sets the article's state to In Pubs Review and prompts the Publications Manager to select a user from the list of members of the Publications user group.

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Pubs Review state where the assignee is the Publications Reviewer selected by pubs\_mgr during the task operation

### 4. State 4 - In Pubs Review

The Publications Reviewer (pubs\_one) reviews the article for its consistency with respect to other documentation, then decides whether to approve or reject the article by choosing the corresponding transition. To approve the article, pubs\_one selects the transition **Approve Article** and provides any desired comments in the Pubs Comments field. This results in the article being placed in the In Final Author Review state and is assigned to the Author (Reporter). To reject the article, pubs\_one selects the transition **Reject Article** and must provide comments to describe why the article was rejected in the Pubs Comments field. This results in the article being placed in the Rejected By Pubs state and assigned to the Author (Reporter).

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Final Author Review state with the assignee set to be the <Reporter>
- Defining a transition to move a record to the Rejected By Pubs state with the <Reporter> set as the new assignee

### Task Fields

- Configuring Pubs Comments (optional) to be presented during the task operation for the transition to the In Final Author Review state
- Configuring Pubs Comments (required) to be presented during the task operation for the transition to the Rejected By Pubs state

## 5. State 5 - In Final Author Review

The Author (Reporter) reviews the article one last time before publishing it to the Knowledge Base. To do this, the Author selects the transition **Publish to Knowledge Base** and enters any desired information into the Support Comments field. The Publication Date is automatically initialized with the date and time. This will place the article in the Published in KB state and assign it to TBD.

This is implemented by:

### Transitions

- Defining a transition to move a record to the Published in KB state where the assignee is TBD ("no one" since it is now published)

### Task Fields

- Configuring Support Comments (optional) and Publications Date (read only and initialized) to be presented during the Task operation for the transition to the Published in KB state.

## 6. State 6 - Published in KB

Articles in this state are searchable via the Knowledge Base Search Page and are assigned to TBD. An article may become obsolete and thus will need to be updated or removed from the Knowledge Base by the Support Engineer (sup\_one). To update an article, Support can use the transition **Update Active (in KB) Article**. This transition allows sup\_one the option to update any of the following fields: Title, Article Type, Product, Version, Oldest Version, Newest Version, Severity, Description, and Workaround. sup\_one is then required to enter a history comment. After making any changes, the article will remain in the Published in KB state, assigned to TBD. To remove an article from being searchable in the Knowledge Base, sup\_one can select the transition **Archive (Remove From Knowledge Base)** and must enter a history comment. This transition will place the article in the Archived (obsolete) state, assigned to TBD. The Archive Date will be automatically initialized with the date and time.

This is implemented by:

### Transitions

- Defining a transition to update fields in the article with New State set to the same state (Published in KB) and New Assignee set to <Same Assignee> with history comment set to be required
- Defining a transition to move the article to the Archived (obsolete) state and assigned to TBD ("no one" since the article is obsolete) with history comment set to be required

### Task Fields

- Configuring all of the following fields to be optional fields presented during the task operation for the transition to update the article: Title, Article Type, Product, Version, Oldest Version, Newest Version, Severity, Description, and Workaround
- Configuring Archive Date (read only and initialized) as a field to be presented during the task operation for the transition to the Archived (obsolete) state

#### 7. **State 10 - Archived (obsolete)**

This state indicates that the article contains obsolete information and is no longer searchable in the Knowledge Base

#### 8. **State 20 - Rejected By Dev**

Articles in this state were rejected during the review made by a Developer. sup\_one must make changes recommended by the Developer, then use the transition **Resubmit For Development Review** to send the article back to the Developer for another review. This transition will require sup\_one to enter a history comment, then will move the article to the In Dev Review state and assign it to the Developer who last reviewed the article when it was previously in the In Dev Review state.

This is implemented by:

##### **Transitions**

- Defining a transition to move the article to the In Dev Review state with New Assignee set to <Last Assignee for New State> with history comment set to be required

#### 9. **State 21 - Rejected By Pubs**

Articles in this state were rejected during the review made by a Publications Reviewer. sup\_one must make changes recommended by the Publications Reviewer, then use the transition **Resubmit For Pubs Review** to send the article back to the Publications Reviewer for another review. This transition will require sup\_one to enter a history comment, then will move the article to the In Pubs Review state and assign it to the Publications Reviewer who last reviewed the article when it was previously in the In Pubs Review state.

This is implemented by:

##### **Transitions**

- Defining a transition to move the article to the In Pubs Review state with New Assignee set to <Last Assignee for New State> with history comment set to be required

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## **Sample Saved Charts**

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

## Email Notification

The Knowledge Base template is set up to notify users as follows:

### On Add of an Article

The current assignee and the reporter of the article as well as the members of the Support Managers user group are notified

### On Delete of an Article

The current assignee, the manager for the current state, and the reporter of the article are notified

### On Edit of an Article

Both the current assignee, and the manager for the current state of the article are notified

### On Task of an Article

The current assignee of the article is notified

### On Change of State to Archived (obsolete) or Published in KB

The members of the Support Managers user group are notified

---

## Security

The Knowledge Base template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing the field of the records have been removed from all users that are not Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.

## Overview

The Help Desk template supports a typical Help Desk environment in which issues or requests are reported by end users and the Help Desk team resolves the issues or processes requests.

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## Projects

A default project called "Help Desk" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

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## Forms

A default form called "Ticket" is available in this template, is associated with the "Help Desk" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Ticket form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an asterisk are required by the system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the record is created.
<b>Title</b>	A one line text summary of the problem or request. Set at the time the record is created.
<b>Product*</b>	Identifies the product for which the record has been reported. Set at the time the record is created.
<b>Component</b>	Identifies the component for which the record has been reported. Values displayed in this field depend on the value selected for the Product field. Set at the time the record is created.
<b>Platform</b>	Describes the hardware or software platform where the problem occurs. Examples are the operating system (e.g. Windows 2000). Set at the time the record is created.
<b>Request Type</b>	Classifies the record. Some of the possible values are: Bug / Issue, Enhancement, Equipment Request, Feedback. Set at the time the record is created.

<b>Severity</b>	Describes how serious the problem is. Set at the time the record is created.
<b>Description</b>	Full description of the problem. Ideally describes the nature of the problem and how to reproduce the behavior. Set at the time the record is created.
<b>Reported By*</b>	Name of the user that reported the record. Initially set to the name of the current user logged in. Set at the time the record is created.
<b>Date Reported</b>	The date the record was created. Automatically initialized, and set at the time the record is created.
<b>Workaround</b>	Describes how to work around the reported problem. Set at the time the record is created.
<b>Pending Issues</b>	Describes what information or tasks are needed before a record can continue to be processed. Set by the Help Desk Engineer if issues arise that keep the record from being processed.
<b>Status*</b>	Current state of the record. Changes as the record is processed through the workflow.
<b>Assigned To*</b>	User the record is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Est. Close Date</b>	Date when the issue or request is expected to be resolved. Set by the Help Desk Engineer when deciding how to process the record.
<b>Priority</b>	Describes the relative importance of handling this record compared to other records entered in the system.
<b>Close Date</b>	Date when the record was closed. Set by Help Desk when issue or request has been resolved. Automatically initialized to the current date/time.
<b>Close Detail</b>	Describes the details about how the issue or request was resolved. Set by the Help Desk when the issue or request has been resolved.
<b>Deleted*</b>	Denotes whether the record has been deleted.

## Dependent Pulldowns

The pulldown field Component is dependent on the pulldown field called Product, allowing the Component field to only display those values that correspond to the Product selected. The examples below illustrate the purpose of Dependent Pulldowns.

### Example 1

When "Hardware" is selected in the Product field, the Component field displays the following option menu items:

- Computer
- Modem
- Monitor
- Other
- Printer

### Example 2

When "Software" is selected for the Product field, the Component field displays the following option menu items:

- Our Browser

Our Database  
Our Email  
Other

Details on setting up dependencies between pulldown fields can be found in the [Customizing Pulldown Dependencies](#) section of the Admin Guide.

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## Workflows

It is assumed that records will be processed and moved through the workflow process by using the Task operation. A default workflow called "Help Desk Ticket Process" is available in this template and is associated with the "Ticket" Form and is in use in the "Help Desk" Project. You can customize the Help Desk Ticket Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Reported

It is assumed that each Help Desk Engineer is assigned to a particular product or area of expertise. When a record is created, it is set to the state Reported, and assigned to a particular Help Desk Engineer based on the Product selected in the record. Each Help Desk Engineer reviews the incoming records and decides how to process each using a list of possible workflow paths. The Help Desk Engineer can choose one of the following:

- Begin processing a record by selecting the transition called **Start Processing Request**. The Description field is presented for the Help Desk Engineer's reference. The Help Desk Engineer must enter an Estimated Close Date and can optionally set the Priority of the request. This transition will keep the record assigned to the Help Desk Engineer and place the record in the In Process state.
- Close the record by selecting the transition called **Close**. The Description field is presented for the Help Desk Engineer's reference. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). The Help Desk Engineer will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.
- Delay processing of the request by selecting the **Hold Request** transition. The Description field is presented for the Help Desk Engineer's reference. The Help Desk Engineer is required to enter a reason for the delay in the Pending Issues field and an Estimated Close Date. It is optional to set the Priority for the record. This transition will place the record in the On Hold state, but will still be assigned to the Help Desk Engineer.

This is implemented by:

### Workflow Properties

- Defining Reported as the Default Add State when a record is added
- Assigning a Help Desk Engineer as the manager for the Reported and On Hold states for each Product e.g. Help Desk Engineer One (help\_one) is the manager for the Reported and On Hold states for the Hardware Product

## Transitions

- Defining a transition to move a record to the In Process and On Hold states where the assignee is <Same Assignee>.
- Defining transitions to move a record to the Closed state where the assignee is TBD.

## Task Fields

- Configuring Description (read only), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the In Process state.
- Configuring Description (read only), Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Description (read only), Pending Issues (required), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the On Hold state.

## 2. State 2 - In Process

The Help Desk Engineer assigned to the record attempts to resolve the issue or request, then chooses one of the following transitions:

- If the issue is resolved, the Help Desk Engineer can close the issue by selecting the transition **Close**. The Description field is presented for the Help Desk Engineer's reference. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). The Help Desk Engineer will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.
- If the issue has not been resolved and the Help Desk Engineer needs to escalate the issue to a manager for troubleshooting assistance, the **Escalate** transition will be selected. The Description field is presented for the Help Desk Engineer's reference. The Help Desk Engineer is required to enter the reason for the escalation in the Pending Comments field. This will place the record in the Escalated state and will assign it to the Help Desk Manager.
- If the issue cannot be processed until a later (e.g. because more information is needed or there is a delay to receive equipment needed to resolve the issue), the Help Desk Engineer can select the **Hold Request** transition. The Description field is presented for the Help Desk Engineer's reference. The Help Desk Engineer is required to enter a reason for the delay in the Pending Issues field and an Estimated Close Date. It is optional to set the Priority for the record. This transition will place the record in the On Hold state, but will still be assigned to the Help Desk Engineer.

This is implemented by:

## Workflow Properties

- Defining Help Desk Manager (help\_mgr) as the manager for the Escalated state

## Transitions

- Defining a transition to move a record to the Closed state where the assignee is TBD.
- Defining a transition to move a record to the On Hold state where the assignee is <Same Assignee>.
- Defining a transition to move a record to the Escalated state where the assignee is the manager of that state

## Task Fields

- Configuring Description (read only), Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Description (read only), Pending Issues (required), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the On Hold state.
- Configuring Description (read only) and Pending Issues (required) to be presented during the task operation for the transition to the Escalated state.

### 3. State 3 - Escalated

The Help Desk Manager (help\_mgr) decides how to proceed with the issue:

- The issue can be sent back to the Help Desk Engineer by using the **De-escalate** transition. The Description field will be provided for help\_mgr's reference. Comments to aid the Help Desk Engineer to resolve the issue must be entered into the Pending Issues field. Optionally, the Priority of the record can be updated. This will place the record back into the In Process state and assign it to the Help Desk Engineer who worked on the record when it was previously in that state.
- The issue can be closed by using the **Close** transition. The Description field is presented for reference purposes. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). help\_mgr will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.

This is implemented by:

## Transitions

- Defining a transition to move a record to the In Process state where the assignee is <Last Assignee for New State>
- Defining a transition to move a record to the Closed state where the assignee is TBD

## Task Fields

- Configuring the Description (read only), Pending Issues (required), Priority (optional) to be presented during the Task operation for the transition to the In Process state.
- Configuring the Description (read only), Close Date (read only, initialized), and Close Detail (required) fields to be presented for the transition to the Closed state.

### 4. State 5 - On Hold

Processing was stopped for the records in this state. The Help Desk Engineer can resume processing of a record using the **Resume Processing** transition. The Description field will be provided for reference purposes and the Help Desk Engineer will have the option to update the Estimated Close Date and Priority fields. This will place the record in the In Process state and will remain assigned to the Help Desk Engineer. The Help Desk Engineer can close the issue by using the **Close** transition. The Description field is presented for reference purposes. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). The Help Desk Engineer will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Process state with New Assignee set to <Same Assignee>
- Defining a transition to move a record to the Closed state and assigned to TBD

### Task Fields

- Configuring the Description (read only), Est. Close Date (optional), Priority (optional) to be presented during the Task operation for the transition to the In Process state.
- Configuring the Description (read only), Close Date (read only, initialized), and Close Detail (required) fields to be presented for the transition to the Closed state.

## 5. State 6 - Closed

Processing on these records has been completed.

---

## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

---

## Email Notification

The Help Desk template is set up to notify users as follows:

### On Add or Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of State to Inactive

The user who reported the record is notified when a record is moved to a state where processing has stopped

(any state included in the **Inactive** state group: Closed or On Hold)

### **On Change of Assignment**

Both the current assignee and the manager of the current state of the record are notified

---

## **Security**

The Help Desk template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing the field of the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.

## Overview

The Support template supports a typical Support environment in which issues or requests are reported by customers or end users and the Support team resolves the issues or processes requests. This template incorporates 2 levels of Support:

**1st Line Support** attempts to process all incoming records

**2nd Line Support** processes any escalated records that could not be processed by 1st Line Support

**Support Manager** processes any escalated records that could not be processed by 1st or 2nd Line Support

---

## Projects

A default project called "Support" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

---

## Forms

A default form called "Ticket" is available in this template, is associated with the "Support" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Ticket form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an asterisk are required by the system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the record is created.
<b>Title</b>	A one line text summary of the problem or request. Set at the time the record is created.

<b>Product*</b>	Identifies the product for which the record has been reported. Set at the time the record is created.
<b>Platform</b>	Describes the hardware or software platform where the problem occurs. Examples are the operating system (e.g. Windows 2000). Set at the time the record is created.
<b>Request Type</b>	Classifies the record. Possible values are: Bug, Contract Requirement, Customer Feedback, Customer Problem, Enhancement. Set at the time the record is created.
<b>Severity</b>	Describes how serious the problem is. Set at the time the record is created.
<b>Description</b>	Full description of the problem. Ideally describes the nature of the problem and how to reproduce the behavior. Set at the time the record is created.
<b>Reported By*</b>	Name of the user that reported the record. Initially set to the name of the current user logged in. Set at the time the record is created.
<b>Date Reported</b>	The date the record was created. Automatically initialized, and set at the time the record is created.
<b>Workaround</b>	Describes how to work around the reported problem. Set at the time the record is created.
<b>Pending Issues</b>	Describes what information or tasks are needed before a record can continue to be processed. Set by the Support Engineer if issues arise that keep the record from being processed.
<b>Status*</b>	Current state of the record. Changes as the record is processed through the workflow.
<b>Assigned To*</b>	User the record is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Est. Close Date</b>	Date when the issue or request is expected to be resolved. Set by the Support Engineer when deciding how to process the record.
<b>Priority</b>	Describes the relative importance of handling this record compared to other records entered in the system.
<b>Close Date</b>	Date when the record was closed. Set by Support when issue or request has been resolved. Automatically initialized to the current date/time.
<b>Close Detail</b>	Describes the details about how the issue or request was resolved. Set by the Support when the issue or request has been resolved.
<b>Deleted*</b>	Denotes whether the record has been deleted.

## Support Queues

The Home Page reports can be set up as a queue for Support Engineers to use in prioritizing and processing incoming records. TBD will be the user to which incoming records are assigned while they are in a queue. To represent a queue for the 1st Line Support team on the Home Page, the saved query **1st Line Support Queue [Support]** was created to display all records assigned to TBD in the Reported state. To represent the queue for 2nd Line Support on the Home Page, the saved query **2nd Line Support Queue [Support]** was created to display all records assigned to TBD in the Escalated state.

Information on how records are processed within and outside of the queue are discussed in the Workflow section below.

## Workflows

It is assumed that records will be processed and moved through the workflow process by using the Task operation. A default workflow called "Support Ticket Process" is available in this template and is associated with the "Ticket" Form and is in use in the "Support" Project. You can customize the Support Ticket Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Reported

It is assumed that 1st Line Support Engineers check a queue to pick up incoming records. When a record is created, it is set to the state Reported, and assigned to TBD (a placeholder user to represent records that are in the queue and have not yet been assigned) A 1st Line Support Engineer (sup\_one) selects incoming records from the queue and decides how to process each using a list of possible workflow paths. sup\_one can choose one of the following:

- Begin processing a record by selecting the transition called **Start Processing Request**. The Description field is presented for reference. sup\_one must enter an Estimated Close Date and can optionally set the Priority of the request. This transition will assign the record to sup\_one and place the record in the In Process state.
- Close the record by selecting the transition called **Close**. The Description field is presented for reference. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). sup\_one will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.
- Delay processing of the request by selecting the **Hold Request** transition. The Description field is presented for reference. sup\_one is required to enter a reason for the delay in the Pending Issues field and an Estimated Close Date. It is optional to set the Priority for the record. This transition will place the record in the On Hold state and will assign it to sup\_one.

This is implemented by:

### Workflow Properties

- Defining Reported as the Default Add State when a record is added
- Assigning TBD as the manager for the Reported state

### Transitions

- Defining a transition to move a record to the In Process and On Hold states where the assignee is <LoginUser> (the user performing the task operation).
- Defining a transition to move a record to the Closed state where the assignee is TBD.

### Task Fields

- Configuring Description (read only), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the In Process state.
- Configuring Description (read only), Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Description (read only), Pending Issues (required), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the On Hold

state.

## 2. State 2 - In Process

The Support Engineer (sup\_one) assigned to the record attempts to resolve the issue or request, then chooses one of the following transitions:

- If the issue is resolved, sup\_one can close the issue by selecting the transition **Close**. The Description field is presented for reference. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). sup\_one will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.
- If the issue has not been resolved and sup\_one needs to escalate the issue to 2nd Line Support for troubleshooting assistance, the **Escalate to 2nd Line** transition will be selected. The Description field is presented for reference. sup\_one is required to enter the reason for the escalation in the Pending Comments field. This will place the record in the Escalated state, will assign it to TBD, and place the record in the 2nd Line Support queue.
- If the issue has not been resolved and sup\_one needs to escalate the issue to a manager for troubleshooting assistance, the **Escalate to Manager** transition will be selected. The Description field is presented for reference. sup\_one is required to enter the reason for the escalation in the Pending Comments field. This will place the record in the Escalated state, will assign it to the Support Manager (sup\_mgr).
- If the issue cannot be processed until a later (e.g. because more information is needed or there is some delay before a task can be performed), sup\_one can select the **Hold Request** transition. The Description field is presented for reference. sup\_one is required to enter a reason for the delay in the Pending Issues field and an Estimated Close Date. It is optional to set the Priority for the record. This transition will place the record in the On Hold state, but will still be assigned to the sup\_one.

This is implemented by:

### Workflow Properties

- Defining Support Manager (sup\_mgr) as the manager for the Escalated state

### Transitions

- Defining a transition to move a record to the Closed state where the assignee is TBD.
- Defining a transition to move a record to the Escalated state where the assignee is the manager of that state
- Defining a transition to move a record to the Escalated state where the assignee is TBD (placeholder for the 2nd Line Support queue)
- Defining a transition to move a record to the On Hold state where the assignee is <Same Assignee>.

### Task Fields

- Configuring Description (read only), Close Detail (required) and Close Date (read only and initialized) to be presented during the task operation for the transition to the Closed state.
- Configuring Description (read only) and Pending Issues (required) to be presented during the task operation for the transitions to the Escalated state.
- Configuring Description (read only), Pending Issues (required), Est. Close Date (required) and Priority (optional) to be presented during the task operation for the transition to the On Hold state.

### 3. State 3 - On Hold

Processing was stopped for the records in this state. sup\_one can resume processing of a record using the **Resume Processing** transition. The Description field will be provided for reference and sup\_one will have the option to update the Estimated Close Date and Priority fields. This will place the record in the In Process state and will remain assigned to sup\_one. sup\_one can close the issue by using the **Close** transition. The Description field is presented for reference purposes. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). sup\_one will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.

This is implemented by:

#### Transitions

- Defining a transition to move a record to the In Process state with New Assignee set to <Same Assignee>
- Defining a transition to move a record to the Closed state and assigned to TBD

#### Task Fields

- Configuring the Description (read only), Est. Close Date (optional), Priority (optional) to be presented during the Task operation for the transition to the In Process state.
- Configuring the Description (read only), Close Date (read only, initialized), and Close Detail (required) fields to be presented for the transition to the Closed state.

### 4. State 4 - Escalated

2nd Line Support or the Support Manager decides how to proceed with the issues that have been placed in the Escalated state:

- The issue can be sent back to the sup\_one by using the **De-escalate** transition. The Description field will be provided for reference. Comments to aid sup\_one to resolve the issue must be entered into the Pending Issues field. Optionally, the Priority of the record can be updated. This will place the record back into the In Process state and assign it to sup\_one, who worked on the record when it was previously in that state.
- The issue can be closed by using the **Close** transition. The Description field is presented for reference. This transition will place the record in the Closed state and assign it to TBD ("no one" since this record will not be processed any further). The user (2nd Line Support or the Support Manager) will be required to enter a reason the record was closed in the Close Detail field. The Close Date will be updated automatically.

This is implemented by:

### Transitions

- Defining a transition to move a record to the In Process state where the assignee is <Last Assignee for New State>
- Defining a transition to move a record to the Closed state where the assignee is TBD

### Task Fields

- Configuring the Description (read only), Pending Issues (required), Priority (optional) to be presented during the Task operation for the transition to the In Process state.
- Configuring the Description (read only), Close Date (read only, initialized), and Close Detail (required) fields to be presented for the transition to the Closed state.

### 5. State 5 - Closed

Processing on these records has been completed.

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## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

---

## Email Notification

The Support template is set up to notify users as follows:

### On Add or Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of State to Inactive

The user who reported the record is notified when a record is moved to a state where processing has stopped (any state included in the **Inactive** state group: Closed or On Hold)

### On Change of Assignment

Both the current assignee and the manager of the current state of the record are notified

---

## Security

The Support template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing the field of the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.



## Overview

The Base template provides a template with minimal configuration: only the required fields are available, one workflow state, only the required users and user groups are present. Use of this template is recommended when the rest of available templates do not closely resemble the process you wish to implement in Tracker.

This template contains the following system required user groups:

### Admins

Responsible for performing administrative tasks.

### RestrictedUsers

All restricted users are members of this group.

### Users

All non-Restricted users are members of this group.

---

## Projects

A default project called "First Project" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

---

## Forms

A default form called "Issue" is available in this template, is associated with the "First Project" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Issue form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values via the [Manage Fields](#) section. Field names with an

asterisk (all of the fields in this template) are required by the system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the record is created.
<b>Product*</b>	Identifies the product for which the record has been reported. Set at the time the record is created.
<b>Reported By*</b>	Name of the user that reported the problem. Initially set to the name of the current user logged in. Set at the time the record is created.
<b>Status*</b>	Current state of the record. Changes as the record is processed through the workflow.
<b>Assigned To*</b>	User the record is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Deleted*</b>	Denotes whether the record has been deleted.

---

## Workflows

A default workflow called "Business Process" is available in this template and is associated with the "Issue" Form and is in use in the "First Project" Project. This workflow contains a single state without any transitions. You can customize the Business Process workflow or add additional workflows via the [Manage Workflows](#) section.

### 1. State 1 - Reported

When a record is created, it is set to the state Reported and assigned to TBD

This is implemented by:

#### Default Add State Settings

- Define Default Add State based on the Product field
- Define Reported as the Default Add State when a record is added for all products
- Define All as the state group for Allowed Add States for all products

#### State Managers

State Managers are set in the [Manage Projects](#) section.

- Define State Managers based on the Product field
- Assign TBD as the manager for the Reported state

#### Transitions

There are no transitions defined in the Business Process Workflow.

**Task Fields** There are no task fields defined in the Business Process Workflow.

---

## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

---

## Email Notification

The Base template is set up to notify users as follows:

### On Add or Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of Assignment

Both the current assignee and the manager for the current state of the record are notified

---

## Security

The Base template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing fields within the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.



## Overview

The Change Management template supports a typical change management process. Common to this process is the review of proposed change requests before they can be implemented. This model assumes the following organizations are involved in the change management process:

### Change Board

Responsible for reviewing and approving proposed change requests

### Development

Responsible for implementing change requests.

### QA

Verifies that the change request has been successfully implemented by the Development organization.

### Build

Places the updated files into the final product package.

---

## Projects

A default project called "Change Management" is available in this template and is visible to all user groups. This project can be customized and additional projects can be added via the [Manage Projects](#) section.

---

## Forms

A default form called "Change Request" is available in this template, is associated with the "Change Management" Project and is visible to all user groups. This form can be customized and additional forms can be added via the [Manage Forms](#) section.

---

## Fields

The Change Request form contains the following fields. Note that you can customize the database by adding to or removing fields, or changing any pulldown menu values. Field names with an asterisk are required by the

system and cannot be removed from any form(s).

<b>PRN*</b>	Numeric record identifier. Assigned at the time the request is created.
<b>Summary</b>	A one line text summary of the change being proposed. Set at the time the request is created.
<b>Change Level*</b>	Identifies the level of change being proposed. Set at the time the request is created.
<b>Reported In Version</b>	Version number of the product where related to the proposed change. Set at the time the request is created.
<b>Area</b>	The area related to the proposed change. Possible values are: Hardware, Network, Software, Other and Unknown. Set at the time the request is created.
<b>Severity</b>	Describes how serious the change is. Set at the time the request is created.
<b>Description</b>	Full description of the change. Ideally describes the nature of the change and all ramifications of making the change. Set at the time the request is created.
<b>Reported By*</b>	Name of the user that reported the problem. Initially set to the name of the current user logged in. Set at the time the request is created.
<b>Date Reported</b>	The date the request was created. Automatically initialized, and set at the time the request is created.
<b>Status*</b>	Current state of the request. Changes as the request is processed through the workflow.
<b>Assigned To*</b>	User the request is currently assigned to for processing. Set either manually or automatically during processing of the workflow.
<b>Est. Completion Date</b>	The date the change is estimated to be implemented.
<b>Approval Date</b>	The date the change was approved. Set by the Change Board when the change is approved. Automatically initialized to the current date/time.
<b>Pending Issues</b>	Full description of the reasons a change has been rejected. Set by the Change Board when the change is rejected.
<b>Estimated Size</b>	Used to enter an estimated amount of time it will take for a change to be implemented.
<b>Planned for Version</b>	Identifies the release number of the product in which the change is planned to be included.
<b>Total Time</b>	Used to enter the actual amount of time spent implementing the change.
<b>Implementation Date</b>	Date when the change was implemented. Set by Development when the change is implemented. Automatically initialized to the current date/time.
<b>Implementation Detail</b>	A Description of the action taken by a developer to implement the change. Set by Development when the change is implemented.
<b>Test Date</b>	Date when the implementation of the change was tested. Set by QA when the implementation is tested. Automatically initialized to the current date/time.
<b>Test Description</b>	A Description of the action taken by a QA Engineer to test the implementation. Set by QA when the implementation is tested.
<b>Priority</b>	Describes the relative importance of handling this change compared to other changes entered in the system.
<b>Released in Version</b>	Identifies the release number of the product in which the change will be included.

<b>Close Date</b>	Date when the change was closed. Set when no implementation work will be done for the change. Automatically initialized to the current date/time.
<b>Close Detail</b>	A Description of the reason a change will be closed. Set when no implementation work will be done for the change.
<b>Deleted*</b>	Denotes whether the request has been deleted.

---

## Change Board Queue

A Home Page report can be set up as a queue for the Change Board members to use when reviewing and processing incoming change requests. TBD will be the user to which incoming change requests are assigned while they are in the queue. To represent a queue for the Change Board, the saved query **Pending Approval [Change Board]** was created to display all records assigned to TBD in the Pending Approval state. Information on how records are processed within the queue are discussed in the Workflows section below.

---

## Workflows

It is assumed that requests will be processed and moved through the workflow process by using the Task operation. A default workflow called "Change Request Process" is available in this template and is associated with the "Change Request" Form and is in use in the "Change Management" Project. You can customize this workflow or add additional workflows via the [Manage Workflows](#) section. The workflow implemented by the Change Management template is as follows:

### 1. State 1 - Pending Approval

When a request is created, it is set to the state Pending Approval and is assigned to the Change Board. It is assumed that the Change Board is responsible for reviewing all incoming requests and deciding whether to approve each change. The Change Board can choose one of the following:

- Approve the change request by selecting the transition called **Approve**. This transition will assign the request to the Development Manager and place the request in the Approved state. The Description field has been configured as a read-only task field for the Approver's reference while processing the request. The Approval Date will be set automatically to the current date/time. The Approver has the option to set a Planned for Version and Priority for the request.
- Reject the change request by selecting the transition called **Reject**. This transition will assign the request to the Reporter and place the request in the Rejected state. The Description field has been configured as a read-only task field for the Approver's reference while processing the request. The Approver is required to enter comments into the Pending Issues field to explain the reasons for rejecting the request.
- Close the change request by selecting the transition called **Close**. This transition will assign the request to TBD (no one - since this request will not be processed any further) and will place the request in the Closed state. The Description field has been configured as a read-only task field for the Approver's reference while processing the request. The Close Date will be set automatically to the current date/time. The Approver is required to be enter comments into the Close Detail field to explain why the request has been closed.

This is implemented by:

### Default Add State Settings

- Configuring Default Add State Settings to be based on the Change Level field
- Defining Pending Approval as the Default Add State when a request is added for all products
- Defining All as the state group for Allowed Add States when a request is added for all products

### State Managers

State Managers are configured in the [Manage Projects](#) section.

- Configuring TBD as the state manager for the Pending Approval state
- Configuring the Development Manager as the state manager for the Approved state

### Transitions

- Defining a transition to move a request to the Approved state where the assignee is the State Manager
- Defining a transition to move a request to the Rejected state where the assignee is the Reporter
- Defining a transition to move a request to the Closed state where the assignee is TBD

### Task Fields

- Configuring Description (read only), Approval Date (read only and initialized), Planned for Version (optional) and Priority (optional) to be presented during the transition to the Approved state
- Configuring Description (read only) and Pending Issues (required) to be presented during the transition to the Rejected state
- Configuring Description (read only), Close Date (read only and initialized) and Close Detail (required) to be presented during the transition to the Closed state

## 2. State 2 - Approved

The Development Manager is assumed to be a manager responsible for assigning change requests to the developers for implementation. The Development Manager uses the transition **Assign to Resource** to assign the request to a member of the Developers user group. This places the request in the In Process state.

This is implemented by:

### Transitions

- Defining a transition to move a request to the In Process state with the assignee to be chosen from a list of developers (user group called "Developers")

## 3. State 3 - In Process

The Developer assigned to the request implements the change and can either update how much time has been spent implementing the change by entering the time spent into the Total Time field in the **Update Total Time** transition or mark the task complete by selecting the **Mark Fixed** transition. The developer can enter the time spent implementing the change and is required to enter the details of the work done to implement the change and will place the request in the Implemented state and assign the request to the QA Manager. The Implementation Date will be set automatically with the current date/time.

This is implemented by:

## State Managers

- Defining QA Manager as the manager for the Fixed state

### Transitions

- Defining a transition to keep the record in the same state and assigned to the same assignee
- Defining a transition to move a request to the Fixed state where the assignee is the State Manager

### Task Fields

- Configuring Total Time (required) to be presented and History Comment to be required during the update transition
- Configuring Description (read only), Implementation Date (read only and initialized), Total Time (optional), Implementation Detail (required) to be presented during the transition to the Implemented state

## 4. State 4 - Implemented

Once the request has been routed to the Implemented state, the QA Manager assigns it to a QA Engineer, a member of the QA user group. The request is routed to the In Test state using the transition **Assign to QA**.

This is implemented by:

### Transitions

- Defining a transition to move a request to the In Test state with the assignee to be chosen from a list of QA Engineers (members of a user group called "QA")

## 5. State 5 - In Test

The QA Engineer verifies that the request has been implemented correctly and then uses the transition called **Mark Tested** to advance the request to the Tested. The transition will assign it to the Build Manager (bld\_mgr). If a request has not been implemented correctly and needs to be returned to Development, the QA Engineer can move the request back to the In Development state using the transition **Reject**, which will assign it to the developer who worked on it. For each of these possible paths, the QA Engineer enters information in the Test Date and Test Description fields.

This is implemented by:

## State Managers

- Configuring bld\_mgr to be the manager of the Tested state

### Transitions

- Defining a transition to move a request to the Tested state where the assignee is the state manager
- Creating a transition to move a request to the <Previous State> (In Development) where the assignee is the Last Assignee for the New State.

### Task Fields

- Configuring Implementation Detail (read only), Test Date (read only and initialized) and Test Description (required) to be presented during the Task operation for the transitions to the In Development and Tested states.

## 6. State 6 - Tested

The Build Manager (bld\_mgr) user is assumed to be the user in charge of packaging the product for release, and responsible for ensuring that all the desired changes are included in the release. The Build Manager does what is necessary to make sure that the changes are included in the release, enters the released in version for the request, then advances the state of the request to "Released" using the transition called **Release**.

This is implemented by:

### Transitions

- Defining a transition to move the request to the Released state where the assignee is TBD. TBD ("no one") is selected since the release is the last step in the processing of the record.

### Task Fields

- Configuring Planned for Version (read only), Released in Version (required) as a field to be presented during the transition to the Released state.

## 7. State 7 - Released

This state indicates that processing of the request is complete.

## 8. State 8 - Closed

This state indicates that the request will not be processed.

## 9. State 9 - Rejected

This state indicates the request was rejected by the Change Board. The Reporter can re-submit the change request to the Change Board using the Re-Submit transition. This transition will place the request in the Pending Approval state and assign it to TBD (to represent the Change Board). The Reporter has the option to update the Description field and is required to update the Pending Issues field.

This is implemented by:

### Transitions

- Creating a transition to move the record to the Pending Approval state and assign it to the state manager

### Task Fields

- Configuring Description (optional) and Pending Issues (required) to be presented during the transition to the Pending Approval state

## Sample Saved Charts

A set of sample saved charts are included in this template. Click [here](#) to see details of these sample metrics.

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## Email Notification

The Change Management template is set up to notify users as follows:

### On Add of a Record

The current assignee, the manager for the current state, the reporter of the record and the Change Board are notified

### On Delete of a Record

The current assignee, the manager for the current state, and the reporter of the record are notified

### On Change of Assignment

Both the current assignee and the manager for the current state of the record are notified

### On Change of State to Released or Closed

The user who reported the record is notified when a record is moved to a state where processing is stopped

### On Change of State to Pending Approval

The Change Board is notified when a record is moved to the Pending Approval

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## Security

The Change Management template assumes a very simple security model reflecting a workgroup situation where all users are able to see any record. This is implemented by setting Enable Record Visibility option under General Preferences in the Administration Task page to No.

In addition, the privileges related to editing fields within the records have been removed from users that are not managers or Admin. With this configuration, users can rely on the Task operation to move records through the workflow. This can be changed within the [User Administration](#) section of the Admin page.

**Metrics**

The Metrics operation is a way to generate charts and graphs based on your Tracker data. Sample charts are provided by default in the Tracker templates to provide examples of the charts that can be generated. This section explains the sample charts provided in each template. For information about the operations available in the Metrics page, such as generating a chart, saving a chart or chart layout, please review the [Metrics](#) section.

The explanations of each saved chart below assume that the fields and states in the templates have not been removed or renamed. Removing or renaming record fields or workflow states may change the configuration of the saved chart or may change the results displayed by the sample saved charts. The explanations below also assume that the sample saved charts and sample chart layouts have not been modified. To generate one of the sample charts, simply select it and click the Show Chart button. To change the chart layout (for instance, from a bar chart to a line chart), simply change the Chart Layout setting after selecting the Saved Chart, then click the Show Chart button. More information on these settings can be found in the [Metrics](#) section.

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## Saved Charts in the Product and Web Site Development Templates

The following saved charts are included with the Product Development and Web Site Development templates. The default Project and Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### Project Status (default) [Users]

This metric will generate a pie chart, which displays the relative number of records in each possible state. It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### Add Rate [Users]

This metric will generate two dimensional line chart with the number of records added during each week for the previous 26 weeks broken down by product (one line per product that has at least one record added in the last 26 weeks).

It is designed to give you display trend information about the number of new reports (records added) for each product over the last six months.

### Average Fix Time [Users]

This metric will generate a two dimensional bar chart with the average number number of days it takes to fix a problem, with one bar for each Severity. The time is calculated by using the difference between the Date Reported field and the Fix Date field of each input record.

It is designed to easily see differences in how fast particular issues are fixed based on their Severity.

### Fix Rate [Users]

This metric will generate a line chart, which shows the number of records that were fixed in each of the last 12 months. There is one line for each Request Type. And, the most recent month is a partial month (unless today is the last day of the month). A record is considered fixed if it moved into the Fixed state during the month. It can be used to view the number of fixes completed each month for the previous year. It allows you to distinguish by Request Type (e.g. Bug, Enhancement).

### **Fix Totals [Users]**

This metric will generate a stacked line chart, which shows the cumulative number of records that have been fixed as of the end of each month for the last twelve months. As with Fix Rate, there is one (filled) line for each Request Type and the most recent month is a partial month (unless today is the last day of the month). A record is considered Fixed if it has moved into the Fixed state at some point prior to the end of the month. It can be used to see running totals of issues that were fixed in the previous year, broken down by Request Type (e.g. Bug, Enhancement).

### **Project Summary [Users]**

This metric will generate a table, which displays the numbers of records added for each product in each row of the table. Each column breaks down how many records are currently in each state. It is designed to give you a quick breakdown of the overall status of each project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Severity Trend [Users]**

This metric will generate a three dimensional bar chart that displays the number of records added during each of the last twelve weeks, broken down by Severity. It can be used to see if the severity of records being added is changing over time.

### **Test Fail Rate [Users]**

This metric will generate a line chart, which displays the number of times QA rejected a fix (a record moved from "In Test" to "In Development") during each of the last twelve months. There is one line per product. The most recent month may be a partial month. It is used to see how many items that were marked as Fixed, subsequently failed quality assurance testing. Note: a single issue (record) may have failed multiple times.

### **Test Pass Rate [Users]**

This metric will generate a line chart, which displays the number of times QA accepted (passed) a fix (a record moved from "In Test" to "Tested") during each of the last twelve months. There is one line per product. The most recent month may be a partial month. It is used to see how many items that were marked as Fixed, subsequently passed quality assurance testing.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of records assigned to each user. This can give you a rough idea of the current workload. If you have a field that represents the actual work required for a particular item (e.g. Estimated Size), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Workload by Project [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records were reported against each product.

This can give you a rough idea of the current workload by project.

### **Workload Status [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records are currently in each state.

This can give you a rough idea of the current workload by status.

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## **Saved Charts in the Knowledge Base Template**

The following saved charts are available in the Metrics section of the Knowledge Base template. The default Project and Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### **Project Status (default) [Users]**

This metric will generate a pie chart, which displays the relative number of articles in each possible state. It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular type of article or release, select a Saved Query that only displays (matches) the records for the type or release as the value for Input Records and click Show Chart.

### **Add Rate [Users]**

This metric will generate two dimensional line chart with the number of articles added during each week for the previous 26 weeks broken down by product (one line per product that has at least one record added in the last 26 weeks).

It is designed to give you display trend information about the number of new articles (records added) for each product over the last six months.

### **Article Review Status [Users]**

This metric will generate a pie chart with the relative number of records in each state in the state group "In Review Process".

It is designed to give a quick breakdown of the overall status of the articles in the review steps of the workflow process.

### **Average Review Time [Users]**

A bar chart which displays the average time in days for an article of each type to go from First Draft to Publication.

This metric is calculated based on the First Draft Date and Publication Date set in each article during the workflow process.

### **Project Summary [Users]**

This metric will generate a table, which displays the numbers of records added for each product in each row of the table. Each column breaks down how many records are currently in each state.

It is designed to give you a quick breakdown of the overall status of each project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Publication Rate [Users]**

A line chart which displays the number of records moved to the Published in KB state during each month for the last 12 months. A separate line will be graphed for each article type. The most recent month is a partial month (unless today is the last day of the month). A record is considered Published if it moved into the Published in KB state during the month.

This metric is designed to show a trend of the number of articles of each type published each month for the last year.

### **Publication Totals [Users]**

A line chart which displays the number of records moved to the Published in KB state as of the end of each month for the last 12 months. A separate line will be graphed for each product. As in the Publication Rate chart above, the most recent month is a partial month (unless today is the last day of the month). A record is considered Published if it moved into the Published in KB state during the month.

This metric is designed to show a trend of the number of articles for each product published at the end of the month for the last year.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of articles assigned to each user.

This can give you a rough idea of the current workload. If you have a field that represents the actual work required for a particular item (e.g. a float type field that notes the estimated number of hours required to process an article), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Workload by Project [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records were reported against each product.

This can give you a rough idea of the current workload by project.

### **Workload Status [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records are currently in each state.

This can give you a rough idea of the current workload by status.

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## **Saved Charts in the Help Desk Template**

The following saved charts are available in the Metrics section of the Help Desk template. The default Project and Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### **Project Status (default) [Users]**

This metric will generate a pie chart, which displays the relative number of records in each possible state.

It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Add Rate [Users]**

This metric will generate two dimensional line chart with the number of records added during each week for the

previous 26 weeks broken down by product (one line per product that has at least one record added in the last 26 weeks).

It is designed to give you display trend information about the number of new reports (records added) for each product over the last six months.

### **Average Close Time [Users]**

This metric will generate a two dimensional bar chart with the average number number of days it takes to close an issue, with one bar for each Severity. The time is calculated by using the difference between the Date Reported field and the Close Date field of each input record.

It is designed to easily see differences in how fast particular issues are closed based on their Severity.

### **Close Rate [Users]**

This metric will generate a line chart, which shows the number of records that were closed during each of the last 12 months. There is one line for each Request Type. And, the most recent month is a partial month (unless today is the last day of the month). A record is considered closed if it moved into the Closed state during the month.

It can be used to view the number of records closed each month for the previous year. It allows you to distinguish by Request Type (e.g. Bug, Enhancement).

### **Close Totals [Users]**

This metric will generate a stacked line chart, which shows the cumulative number of records that have been closed as of the end of each month for the last twelve months. As with Close Rate, there is one (filled) line for each Request Type and the most recent month is a partial month (unless today is the last day of the month). A record is considered Closed if it has moved into the Closed state at some point prior to the end of the month. It can be used to see running totals of issues that were closed in the previous year, broken down by Request Type (e.g. Bug, Enhancement).

### **Deadline Performance [Users]**

This metric will generate a bar chart, which shows the average difference in days between the Est. Close Date and the actual Close Date of a record broken down for each product.

It can be used to detect how effective the Est. Close Date is at predicting the actual Close Date of an issue. A negative value for any product indicates that the average issue is resolved before the Est. Close Date.

### **Hardware Component Performance [Users]**

A bar chart which displays the number of current records for every component broken down by request type. This metric is designed to show a snapshot of the hardware components that have the most issues logged and to categorize the types of issues logged for each. This is useful to identify components that have chronic problems.

### **Help Desk Workload [Users]**

A bar chart which displays the number of records assigned to each member of the Help Desk user group. This can give you a rough idea of the current workload. If you have a field which represents the actual work required for a particular item (e.g. a float type field which notes the estimated number of hours required to process an issue), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Project Summary [Users]**

This metric will generate a table, which displays the numbers of records added for each product in each row of

the table. Each column breaks down how many records are currently in each state. It is designed to give you a quick breakdown of the overall status of each project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Requests On Hold [Users]**

A bar chart which displays the number of current records in the On Hold state for every component. This metric is designed to provide a snapshot of the current records where the processing has been delayed. The data is broken down by component to allow you to easily identify problem components.

### **Severity 1 Issue Status [Users]**

A bar chart which displays the relative number of records with a Severity rating of 1 in each state broken down by Product. This metric provides an overall status of the most severe issues reported for each Product.

### **Severity Trend [Users]**

This metric will generate a three dimensional bar chart that displays the number of records added during each of the last twelve weeks, broken down by Severity. It can be used to see if the severity of records being added is changing over time.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of articles assigned to each user. This can give you a rough idea of the current workload. If you have a field which represents the actual work required for a particular item (e.g. a float type field which notes the estimated number of hours required to process an article), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Workload by Project [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records were reported against each product. This can give you a rough idea of the current workload by project.

### **Workload Status [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records are currently in each state. This can give you a rough idea of the current workload by status.

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## **Saved Charts in the Support Template**

The following saved charts are available in the Metrics section of the Support template. The default Project and Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### **Project Status (default) [Users]**

This metric will generate a pie chart, which displays the relative number of records in each possible state. It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular

project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Add Rate [Users]**

This metric will generate a two dimensional line chart with the number of records added during each week for the previous 26 weeks broken down by product (one line per product that has at least one record added in the last 26 weeks).

It is designed to give you display trend information about the number of new reports (records added) for each product over the last six months.

### **Average Close Time [Users]**

This metric will generate a two dimensional bar chart with the average number number of days it takes to close an issue, with one bar for each Severity. The time is calculated by using the difference between the Date Reported field and the Close Date field of each input record.

It is designed to easily see differences in how fast particular issues are closed based on their Severity.

### **Close Rate [Users]**

This metric will generate a line chart, which shows the number of records that were closed during each of the last 12 months. There is one line for each Request Type. And, the most recent month is a partial month (unless today is the last day of the month). A record is considered closed if it moved into the Closed state during the month.

It can be used to view the number of records closed each month for the previous year. It allows you to distinguish by Request Type (e.g. Bug, Enhancement).

### **Close Totals [Users]**

This metric will generate a stacked line chart, which shows the cumulative number of records that have been closed as of the end of each month for the last twelve months. As with Close Rate, there is one (filled) line for each Request Type and the most recent month is a partial month (unless today is the last day of the month). A record is considered Closed if it has moved into the Closed state at some point prior to the end of the month. It can be used to see running totals of issues that were closed in the previous year, broken down by Request Type (e.g. Bug, Enhancement).

### **Company A Service [Users]**

This metric will generate a bar chart, which shows the status of each record reported by the Company A user group broken down by request type.

It can be used to see an overall picture of the type and status of the issues in process reported by Company A. This can be changed to show the status for records reported by other user groups (other companies, customers, vendors, partners, etc.)

### **Deadline Performance [Users]**

This metric will generate a bar chart, which shows the average difference in days between the Est. Close Date and the actual Close Date of a record broken down for each product.

It can be used to detect how effective the Est. Close Date is at predicting the actual Close Date of an issue. A negative value for any product indicates that the average issue is resolved before the Est. Close Date.

### **High Severity Issue Status [Users]**

A line chart which displays the relative number of records with a Severity rating of 1, 2, or 3 in each state with a line for each Product.

This metric provides an overall status of the most severe issues reported for each Product.

### **Project Summary [Users]**

This metric will generate a table, which displays the numbers of records added for each product in each row of the table. Each column breaks down how many records are currently in each state. It is designed to give you a quick breakdown of the overall status of each project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Requests On Hold [Users]**

A bar chart which displays the number of current records in the On Hold state for every component. This metric is designed to provide a snapshot of the current records where the processing has been delayed. The data is broken down by component to allow you to easily identify problem components.

### **Severity Trend [Users]**

This metric will generate a three dimensional bar chart that displays the number of records added during each of the last twelve weeks, broken down by Severity. It can be used to see if the severity of records being added is changing over time.

### **Support Workload [Users]**

A bar chart which displays the number of records assigned to each member of the Support user group. This can give you a rough idea of the current workload. If you have a field which represents the actual work required for a particular item (e.g. a float type field which notes the estimated number of hours required to process an issue), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of articles assigned to each user. This can give you a rough idea of the current workload. If you have a field which represents the actual work required for a particular item (e.g. a float type field which notes the estimated number of hours required to process an article), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

### **Workload by Project [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records were reported against each product. This can give you a rough idea of the current workload by project.

### **Workload Status [Users]**

This metric will generate a table, which displays in each row the number of records currently assigned to a user. Each column breaks down how many records are currently in each state. This can give you a rough idea of the current workload by status.

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## **Saved Charts in the Base Template**

The following saved charts are available in the Metrics section of the Support template. The default Project and

Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### **Project Status (default) [Users]**

This metric will generate a pie chart, which displays the relative number of records in each possible state. It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the records for the project or release as the value for Input Records and click Show Chart.

### **Add Rate [Users]**

This metric will generate two dimensional line chart with the number of records added during each week for the previous 26 weeks broken down by product (one line per product that has at least one record added in the last 26 weeks).

It is designed to give you display trend information about the number of new reports (records added) for each product over the last six months.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of articles assigned to each user.

This can give you a rough idea of the current workload. If you have a field which represents the actual work required for a particular item (e.g. a float type field which notes the estimated number of hours required to process an article), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.

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## **Saved Charts in the Change Management Template**

The following saved charts are included with the Change Management template. The default Project and Form will be selected as part of the criteria. If your workgroup contains multiple projects and forms, these charts can be [edited](#) to include additional projects and forms, if desired:

### **Project Status (default) [Users]**

This metric will generate a pie chart, which displays the relative number of requests in each possible state. It is designed to give you a quick breakdown of the overall status of a project. To limit the chart to a particular project or release, select a Saved Query that only displays (matches) the requests for the project or release as the value for Input Records and click Show Chart.

### **Add Rate [Users]**

This metric will generate two dimensional line chart with the number of requests added during each week for the previous 26 weeks broken down by Area (one line per Area that has at least one request added in the last 26 weeks).

It is designed to give you display trend information about the number of new reports (requests added) for each Area over the last six months.

### **Average Implementation Time [Users]**

This metric will generate a two dimensional bar chart with the average number number of days it takes to implement a request, with one bar for each Severity. The time is calculated by using the difference between the Date Reported field and the Implementation Date field of each input record.

It is designed to easily see differences in how fast particular changes are implemented based on their Severity.

### **Average Total Time**

This metric will generate a bar chart, which shows the average value of the Total Time field for the group of input records, with one bar for each Area.

It is designed to easily see the total time spent implementing changes in different Areas.

### **Implementation Rate [Users]**

This metric will generate a line chart, which shows the number of requests that were implemented in each of the last 12 months. There is one line for each Change Level. And, the most recent month is a partial month (unless today is the last day of the month). A request is considered implemented if it moved into the Implemented state during the month.

It can be used to view the number of changes implemented each month for the previous year. It allows you to distinguish by Change Level (e.g. 1 - Urgent, 2 - Standard, 3 - Non urgent).

### **Implementation Totals [Users]**

This metric will generate a stacked line chart, which shows the cumulative number of requests that have been implemented as of the end of each month for the last twelve months. As with Implementation Rate, there is one (filled) line for each Change Level and the most recent month is a partial month (unless today is the last day of the month). A request is considered implemented if it has moved into the Implemented state at some point prior to the end of the month.

It can be used to see running totals of changes that were implemented in the previous year, broken down by Change Level (e.g. 1 - Urgent, 2 - Standard, 3 - Non urgent).

### **Request Approval Rate**

This metric will generate a line chart which shows the number of requests that have been approved in each of the last 12 months. There is one line for each Area. And, the most recent month is a partial month (unless today is the last day of the month). A request is considered approved if it moved into the Approved state during the month.

It can be used to view the number of changes approved each month for the previous year. It allows you to distinguish by Area (Hardware, Software, etc.).

### **Request Rejection Rate**

This metric will generate a line chart which shows the number of requests that have been rejected in each of the last 12 months. There is one line for each Area. And, the most recent month is a partial month (unless today is the last day of the month). A request is considered approved if it moved into the Rejected state during the month.

It can be used to view the number of changes rejected each month for the previous year. It allows you to distinguish by Area (Hardware, Software, etc.).

### **Severity Trend [Users]**

This metric will generate a three dimensional bar chart that displays the number of requests added during each of the last twelve weeks, broken down by Severity.

It can be used to see if the severity of requests being added is changing over time.

### **Test Fail Rate [Users]**

This metric will generate a line chart, which displays the number of times QA rejected an implementation (a request moved from "In Test" to "In Process") during each of the last twelve months. There is one line per Area.

The most recent month may be a partial month.

It is used to see how many requests that were marked as Implemented, subsequently failed quality assurance testing. Note: a single request may have failed multiple times.

### **Test Pass Rate [Users]**

This metric will generate a line chart, which displays the number of times QA accepted (passed) an implementation (a record moved from "In Test" to "Tested") during each of the last twelve months. There is one line per Area. The most recent month may be a partial month.

It is used to see how many requests that were marked as Fixed, subsequently passed quality assurance testing.

### **Workload [Users]**

This metric will generate bar chart, which displays the number of requests assigned to each user.

This can give you a rough idea of the current workload. If you have a field that represents the actual work required for a particular item (e.g. Estimated Size), you can create your own chart to total the value(s) of that field for each user and display it in a similar fashion.



The Tracker Administration section is the interface for performing customization and maintenance. In order to access the Administration section for a workgroup, you must be logged in as a user with the **Admin** privilege. The Admin group always has this privilege and the **Admin** user is always a member of this group.

The initial **Admin** user password is "Admin". When you first log in to the system after installation, you can do so using this User ID and password. It is recommended that you change this password before adding other users to the system.



The Admin icon linked directly to the Tracker Administration section is included in the Tracker Button Bar for all members of user groups that have the Admin privilege enabled.

When clicking on the Admin icon for the first time, Tracker will check to see if there is a newer version available. If a newer version is available, you will see a note at the top of the Administration section.

**Note:** Many administrative functions can make large changes to the Tracker database. To prevent confusion to users (things may change suddenly as a result of an administrative task), it is recommended that you make administrative changes when no one is using the system. In addition, **it is important to make regular backups of your workgroup database and attachments. If you are using SQL Server or Oracle as the database type for your workgroup, a simple file copy or a simple file backup to tape is not sufficient for backing up SQL Server or Oracle database files because they are not standard files.** More information on backing up Tracker workgroups can be found in the [Database Administration](#) section of the [Workgroup Management System Help Guide](#)

The following options are available in the Administration section:

### [Manage Projects](#)

Add, edit, remove and set up projects, including configuring the forms, workflows, state managers, visibility and incoming email settings for each project.

### [Manage Forms](#)

Adding, editing and removing forms from the workgroup can be done in this section. In addition, you can set which fields are available on each form

### [Manage Fields](#)

Adding, editing, and removing global fields can be done in this section. The settings in this area also contain options such as, on which forms and pages and to which user groups should a field be made visible, the order of the fields on each page, and whether a field is required as well as settings for the style of fields, dependent pulldowns, auto fill and field help features. The option menu items for each pulldown field are defined in this section. You can also select a default value for the Add page and set up dependencies between pulldowns.

### [Manage Workflows](#)

Add, edit, remove, and set up workflows, including configuring the list of states, transitions, fields that are presented during the Task operation, forms, alerts and email rules for each workflow.

### [Email Configuration](#)

Allows you to set up the email server and define global properties for the outgoing and incoming mail features.

### [User Administration](#)

In this section you can add, edit, and remove user accounts. You can also set up user groups and their respective privileges as well as import user accounts into the workgroup.

### [User Sessions](#)

You can use this section to see how many sessions are currently active in the workgroup. You have the option to end any of the sessions (e.g. to perform maintenance on the workgroup).

### [General Preferences](#)

Set options for workgroup-wide parameters (e.g. enable features such as Alerts, Discussion, etc.)

### [User Preferences](#)

Set default preferences applied to any new user accounts added to this workgroup

### [Color Preferences](#)

Allows you to customize the colors of items displayed throughout the Tracker pages.

### [Login Options](#)

Configure options for the Login and Self Registration pages such as self registration and remember password features and text displayed in the header or as instructions as well as custom HTML that can be used to add information, links or your logo to integrate the Login and Self Registration pages with your web site.

### [Send Email](#)

Allows you to send an email to a user or user group in this workgroup. Also used for troubleshooting email issues.

### [Maintenance](#)

This section contains an option to delete test records from this workgroup. It also contains other utilities used to diagnose and repair Tracker as directed by NetResults Technical Support.

### [Submit Page Options](#)

This section contains settings used to customize the Submit via Web for Unregistered Users feature for the workgroup. Use of this option requires a license key.

### [Knowledge Base](#)

Settings for creating and customizing a searchable Knowledge Base are contained in this section. Use of this option requires a license key.

 <b>NetResults Tracker</b>	
<b>Managing Projects</b>	Help Topics    <<    >>

## Overview

Projects can be defined in Tracker to allow you to associate the forms (fields), workflow, users and user groups related to a particular project.

A Default Project is created in each workgroup. The name of the default project depends on the template that was used to create the workgroup. For example, the Product Development template has the "Product Development Project" created by default and the Help Desk template has the "Help Desk Project" created by default. Information about the default settings in a particular template can be found in the template list in the [Putting It All Together](#) section.

If only one Project is defined in Tracker, users will not see the **Project** field on any of the pages (Add, Edit, Task, Query, Home, etc.) until additional projects are added. Only users that are members of the Admin group (or are members of a user group with the Admin privilege) will see the Project field in the Admin section.

Please note: In the Manage Projects section, a "+" icon is available for expanding sub-sections and a "-" icon is available for collapsing sub-sections.

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## Managing Projects

Multiple projects can be created and managed in the Manage Projects section.

To **view** the properties of a project:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. The properties of the project listed in the **Projects (<Projects>)** pulldown at the top will be displayed. To view the properties of another project, select a project in the Projects field. The page will be refreshed to display the properties of the selected project.

Click on the **Expand All** link to the right of project name to expand all of the sub-sections in the project. The project properties include the available forms and their respective workflows, state managers and user group visibility.

## Projects List

[Edit Global Properties](#)

OK

Add Project

Projects (Project): Product Development ▼

Delete

Set as Default

## [-] Product Development [Edit | Expand All | Collapse]

## [-] Visible to User Groups [Add | Remove]

[-] [Admins], [Developers], [Managers], [QA], [RestrictedUsers], [Users]

## [-] Forms [Manage]

## [-] Issue

[-] Workflow : Product Issue Process [Change]

## [-] Visible to User Groups [Edit]

[-] [Admins], [Developers], [Managers], [QA], [RestrictedUsers], [Users]

## [-] State Managers [Manage | Edit Based On]

[-] Reported : Process Manager

[-] Scheduled : Development Manager

[-] In Development : Development Manager

[-] Fixed : QA Manager

[-] In Test : QA Manager

[-] Tested : Build Manager

[-] Released : TBD

[-] Deferred : Process Manager

[-] Duplicate : TBD

[-] Closed : TBD

## [-] Incoming Email Settings (based on Product) [Manage | Edit Based On]

[-] &lt;Default&gt; (No) [Edit]

[-] None (No) [Edit]

[-] Product A (Yes) [Edit]

[-] Product B (No) [Edit]

Projects (Project): Product Development ▼

Delete

Set as Default

OK

Add Project

## Adding a Project

To add a project:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Click on the **Add Project** button
5. Enter a name for the project in the **Name** field.

Enter an order for the project with respect to other projects in the **Order** field. This will determine in what order the projects are listed in the Project field on the Add, Edit and Submit pages. Projects with the same order will be displayed alphabetically.

Select a form that can be used to submit records for this project in the **Form** field. The forms available for selection are the forms that have been created in the [Manage Forms](#) section. If you have not yet added the form you wish to use with the project, you can select "<None>" for Form. Selecting <None> for Form will also select "<None>" for Workflow.

Select a workflow that will be applied to records submitted using the selected form for this project in the **Workflow** field or select "Empty

Workflow" if you do not wish to have a workflow applied to records submitted using the selected form in this project. The workflows available for selection are the workflows created in the [Manage Workflows](#) section and have been associated with the form selected in the **Form** field above.

6. Click **Continue** to proceed
7. The **Project**, **Form** and **Workflow** selected will be displayed.

Enter an order for the Form with respect to other forms associated with this project in the **Project Form Order** field. This will determine in what order the forms are listed in the Form field on the Add, Edit and Submit pages. Forms with the same order will be displayed alphabetically.

Select which user group(s) should be able to add and access records that belong to the new project in the **Make Visible (Available) To These User Groups** field. Keep in mind that each user needs to be a member of a user group that has access to at least one project in order to be able to login to Tracker. The Admins user group is not available for selection because that user group is given visibility to all projects.

8. Click **OK** to save the project
9. Click **OK** to return to the Manage Projects section or click on the **Add another Form to this Project** button to select another form to be available for this new project.
10. If you clicked on the Add another Form to this Project button:
  - a. Select a form that can be used to submit records for this project in the **Form** field. The forms available for selection are the forms that have been created in the [Manage Forms](#) section.

Select a workflow that will be applied to records submitted using the selected form for this project in the **Workflow** field or select "Empty Workflow" if you do not wish to have a workflow applied to records submitted using the selected form in this project. The workflows available for selection are the workflows created in the [Manage Workflows](#) section and have been associated with the form selected in the **Form** field above. Or, if you would like to add a new workflow to be used with the selected form, select **<Create New Workflow>**.

- b. Click **Continue** to proceed
- c. Enter an order for the Form with respect to other forms associated with this project in the **Project Form Order** field. This will determine in what order the forms are listed in the Form field on the Add, Edit and Submit pages. Forms with the same order will be displayed alphabetically.

Select which user group(s) should be able to add and access records that belong to the new project in the **Make Visible (Available) To These User Groups** field. Keep in mind that each user needs to be a member of a user group that has access to at least one project in order to be able to login to Tracker. The Admins user group is not available for selection because that user group is given visibility to all projects.

If you selected **<Create New Workflow>**, you will be prompted to enter a name for the new workflow in the **Workflow Name** field. You will also need to select the states that should be part of the new workflow in the **Include These States** field. The states available are the states that have been created in the [Global States](#) section.

Select a state group in the **Form's Allowed Add States** field. The Allowed Add States are the group of states that will be available in the Status field on the Add page when adding a record for the selected Project and Form.

Select a state in the **Form's Default Add State** field. The Default Add State is the state selected in the Status field by default when adding a record for the selected Project and Form.

- d. Click **OK** to finishing adding another form to the project. Click **OK** to return to the Manage Forms section for the selected project or click on the **Add another Form to this Project** button.

## Editing a Project

A project's name or order can be edited from the Manage Projects page.

To **edit** a project:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Click on the **Edit** link to the right of the Project Name
6. Make any desired changes to the project's **Name** or **Order** fields
7. Click **OK** to save the changes
8. Click **OK** to return to the Manage Projects section

## Deleting a Project

Before attempting to delete a project, you must remove any forms from the project (and, as a result, remove any records added using the combination of Project and Form).

To **delete** a project:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top
5. Click on the **Manage** link to the right of the **Forms** section
6. If there are any forms in the "Forms In Use" column, click on a form and click on the **Remove** button. Click **OK** to confirm the operation. A warning will be displayed to note that removing the form from the project will remove all its records (with related information such as History, Attachments, Record Security, Source Code Files, Alerts, Discussion Threads, etc.) as well as permanently remove any related State Manager and Incoming Email settings. Click **OK** to remove the form from the project. Click **OK** again when the confirmation is displayed. Click **OK** to return to the Manage Projects section.
7. Click on the **Delete** button to the right of the Projects pulldown
8. Click **OK** and **OK** again to confirm the operation
9. Click **OK** to return to the Manage Projects section

## Setting a Default Project

You can select which project you would like to see by default when you go to the **Manage Projects** page in the Admin section.

To set the **default project**:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select the project you wish to make the default in the **Projects** pulldown at the top
5. Click on the **Set as Default** button to the right of the Project pulldown. If the Set as Default button is not available, this indicates that the project is already set as the default project.

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## Project Visibility

A project can be made visible to certain user groups and forms. This allows you to select which projects and forms a user groups can access such that users can only see projects and forms that are applicable to their role in the project. Each user must be a member of a user group with visibility to at least one Project in order to login to Tracker. Users who do not have visibility to at least one project will be prevented from logging into Tracker.

To **add user groups or forms** to the list of groups/forms to which the project is visible:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. A list of user groups to which the project is currently visible will be displayed under the **Visible to User Groups** heading. Click on the **Add** button to the right of the Visible to User Groups heading.
6. All available forms will be displayed in the **Make These Forms** field. The forms that are available are the forms that have been previously associated with this project. Additional forms can be made available to this project in the [Available Forms](#) section. To select a form, click on the form. To select multiple forms, hold down the **Ctrl** button on your keyboard while selecting forms. To select all forms, click on the **All** button to the right of the form list.

All user groups available in the workgroup will be displayed in the **Available To These User Groups** field. To select a user group, click on the user group. To select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting user groups. To select all user groups, click on the **All** button to the right of the user group list.

7. Click **OK** to save the changes, then click **OK** to confirm the operation
8. Click **OK** to return to the Manage Projects section

**Add Form Visibility for Project: Product Development**

OK Cancel

Make These Forms

Issue  
Support

All

Available To These User Groups

[Developers]  
[Managers]  
[QA]  
[RestrictedUsers]  
[Users]

All

OK Cancel

To **remove user groups or forms** from the list of groups/forms to which the project is visible:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. A list of user groups to which the project is currently visible will be displayed under the **Visible to User Groups** heading. Click on the **Remove** button to the right of the Visible to User Groups heading.
6. All available forms will be displayed in the **Make These Forms** field. The forms that are available are the forms that have been previously associated with this project. To select a form, click on the form. To select multiple forms, hold down the **Ctrl** button on your keyboard while selecting forms. To select all forms, click on the **All** button to the right of the form list.

All user groups available in the workgroup will be displayed in the **Unavailable To These User Groups** field. To select a user group, click on the user group. To select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting user groups. To select all user groups, click on the **All** button to the right of the user group list.

7. Click **OK** to save the changes, then click **OK** to confirm the operation. When removing user groups, fields that are only visible to the groups that were removed will also be removed from any saved queries, report layouts, charts or chart layouts where this project is selected. If there are any saved queries or charts created for the user group being removed (or created by users that are members of that user group) and the saved queries/charts only have this project selected, you will be prompted to either edit (to select another project) or delete these saved queries or charts before you are able to remove the user group from the project's visibility settings. Information on editing or deleting saved queries can be found in the [Using Saved Queries and Reports](#) Help section. Information on editing or deleting saved charts can be found in the [Metrics](#) section.
8. Click **OK** to return to the Manage Projects section

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## Available Forms

Multiple forms can be associated with a single project. The forms available for a project can be configured from the Manage Projects section.

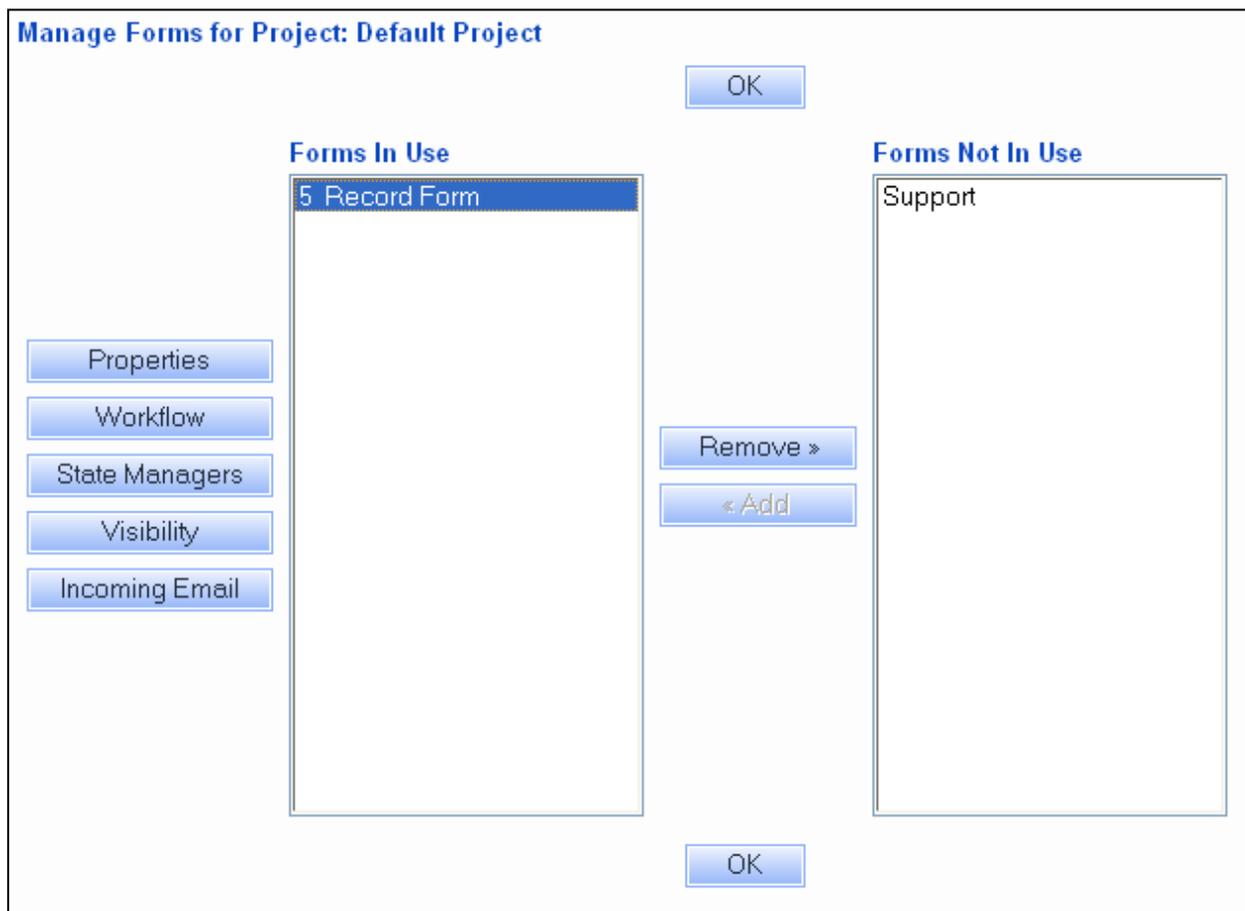
To **manage** the available forms for a project:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Click on the **Manage** link to the right of **Available Forms**
6. Any forms currently used by the project will be listed in the **Forms In Use** column. Any available forms not currently used by the project will be listed in the **Forms Not In Use** column. The forms available in the Forms Not In Use column are created in the [Manage Forms](#) section.

To add a form to be used by the project, click on the form in the Forms Not In Use column, then click on the **Add** button.

To remove a form so that it is no longer used by the project, click on the form in the Forms In Use column, then click on the **Remove** button. If there are any records that have been added using the selected combination of Project and Form, a warning will be displayed to note that removing the form from the project will remove all its records (with related information such as History, Attachments, Record Security, Source Code Files, Alerts, Discussion Threads, etc.) as well as permanently remove any related State Manager and Incoming Email settings. Click **OK** to remove the form from the project. Click **OK** again when the confirmation is displayed.

7. Click **OK** to return to the Manage Projects section or click on a form in the Forms In Use column and click on [Properties](#), [Workflow](#), [State Managers](#) or [Visibility](#) buttons to modify the form's properties.



## Properties of Available Forms

Properties can be set for the forms in use by a project. Expanding a form in the Available Forms section of a project will display the form's [workflow](#), [visibility](#), [state managers](#) and [incoming email settings](#). You can configure these properties for the form or configure each section based on each option menu item in a pulldown field.

## Form Workflow

A form in use by a project can have a workflow associated with it if needed or can have no workflow.

To **set the workflow property** for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Click on the **Change** link to the right of **Workflow**
6. Select a workflow for the form. The workflows available for selection are managed in the [Available Forms](#) section of the [Manage Workflows](#) page.
7. Click **OK** to save the selection and click **OK** again to confirm the operation

If the new workflow does not contain states that were present in the old workflow, you will be prompted to select replacements for the states that are not in the new workflow to be used in records (where the Status field is set to one of the old states), [Incoming Email settings](#), [Saved Queries](#) and [Saved Charts](#). Click **OK** to save the selections.

8. Click **OK** to return to the Manage Projects section

## Form Visibility

A form can be made visible to certain user groups. This allows you to select which forms a user groups can access such that users can only see forms that are applicable to their role in the project.

To **edit** the visibility of a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. Click on the "+" icon to the left of the **Visible to User Groups** heading in the **Available Forms** section to see a list of user groups to which the form is currently visible. Click on the **Edit** link to the right of the Visible to User Groups heading to add or remove user groups from the list of user groups to which the project is visible.
6. All user groups available in the workgroup will be displayed in the **Make Visible (Available) To These User Groups** field. To select or de-select a user group, click on the user group. To select or de-select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting/de-selecting user groups. To select all user groups, click on the **All** button to the right of the user group list. To remove all user groups, click on the **None** button to the right of the user group list. Click **Reset** if you wish to reset the list to how it was set when the list was last saved (the last time the **OK** button was clicked to save the user group selections). The Admins user group is not available for selection because that user group is given visibility to all forms.
7. Click **OK** to save the changes. When removing user groups, fields that are only visible to the groups that were removed will also be removed from any saved queries, report layouts, charts or chart layouts where this form is selected. If there are any saved queries or charts created for the user group being de-selected (or created by users that are members of that user group) and the saved queries/charts only have this combination of project and form selected, you will be prompted to either edit (to select another form) or delete these saved queries or charts before you are able to remove the user group from the form's visibility settings. Information on editing or deleting saved queries can be found in the [Using Saved Queries and Reports](#) Help section. Information on editing or deleting saved charts can be found in the [Metrics](#) section.
8. Click **OK** to return to the Manage Projects section

## Form State Managers

A set of state managers can be configured for a form. State Managers are users who are responsible for records in a particular state. State Managers can be used for [automatic assignment during the Add and/or Task operations](#) or can be used as roles when configuring [email notification](#) or [alert settings](#). State Managers can be configured for a form or based on each option menu item in a particular pulldown.

### Edit State Managers in Workflow: Default Workflow (Form: Record Form in Project: Default Project)

	OK	Cancel
Reported	Development Manager	▼
Scheduled	Development Manager	▼
In Development	Development Manager	▼
Fixed	QA Manager	▼
In Test	QA Manager	▼
Tested	QA Manager	▼
Released	Build Manager	▼
Deferred	Development Manager	▼
Duplicate	Process Manager	▼
Closed	TBD	▼
	OK	Cancel

To **manage** the state managers for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Under the desired form, click on the "+" icon to the left of the **State Managers** heading see the current state manager settings. Click on the **Manage** link to the right of **State Managers** heading to make changes to the state manager settings.
6. The current State Managers will be displayed.

If the state managers are based on a particular pulldown field, a **<Pulldown Name> <Option Menu Item> State Managers** field will be displayed (where <Pulldown Name> is the name of the selected pulldown field and <Option Menu Item> is the option menu item in the selected pulldown field). If a **<Pulldown Name> <Option Menu Item> State Managers** field is not displayed, this indicates that the state managers are not based on the option menu item selected in a particular field. To select a pulldown field for the state managers to be based on, use the [Edit Based On](#) link to the right of the State Managers heading on the [Manage Projects](#) section.

Select an option in the **<Pulldown Name> <Option Menu Item> State Managers** field to set the State Managers that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the State Managers that correspond to that selection.

The **<Pulldown Name> <Option Menu Item> State Managers** field contains the following options:

- **<Default>**  
Selecting this option will allow you to choose the State Managers that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same State Managers that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- **Option Menu Items for the Based On pulldown**  
Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the State Managers that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the State Managers configured for **<Default>** to be filled into the State Managers for the option menu item selected.

The states listed in the State Managers list will be the states configured for the [workflow associated with the selected form](#). Select a user to be the state manager for each state in the list. Only non-Restricted users will be available for selection.

7. Click **OK** to save the selections
8. Click **OK** to return to the Manage Projects section

To **edit the pulldown** that the State Managers are based on:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. Click on the "+" icon to the left of the **State Managers** section for the form you wish to modify
6. Click on the **Edit Based On** link to the right of **State Managers**
7. Select a pulldown in the **Based on Pulldown** so that you can configure different State Managers for each option menu item in this pulldown
8. Click **OK** to save your selection
9. Click **OK** to return to the Manage Projects section or click **Set State Managers** to configure the settings for each option menu item in the selected pulldown

To **edit the state managers** for a specific pulldown option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. Click on the "+" icon to the left of the **State Managers** section for the form you wish to modify
6. Click on the **Manage** link to the right of the State Managers section
7. The State Managers for the selected option menu item will be displayed.

If you are editing the settings for the option menu item **<Default>**, the State Managers displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available when editing the settings for <Default>. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same State Managers that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for an option menu item in the pulldown, the State Managers displayed will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the State Managers configured for **<Default>** to be filled into the State Managers for the option menu item selected.

The states listed in the State Managers list will be the states configured for the [workflow associated with the selected form](#). Select a user to be the state manager for each state in the list. Only non-Restricted users will be available for selection.

8. Click **OK** to save the selections
9. Click **OK** to return to the Manage Projects section

## Incoming Email Settings

Incoming Email Settings are configuration settings for the [Submit via Email](#) feature that determine how incoming email messages are processed by Tracker. Incoming Email Settings can be configured for a form or based on the option menu item selected in a particular pulldown field.

**Set Incoming Email Settings for Form: Record Form in Project: Default Project**

OK Cancel

Enable Submit via Email Yes ▾

Mail Account User Name support

Mail Account User Password ●●●●●●

Mail Server Type POP3 ▾

Mail Server Name smtp.yourcompany.com

Save Email 'Subject' as Title ▾

Save Email 'Body' as Description ▾

Default Initial State for Incoming Emails Reported ▾

Set Reporter by Mapping 'From' Address Yes ▾

Action for Unmapped Emails <Set Reporter to Unregistered User> ▾

Save Attachments in Email Yes ▾

Save Raw Email as an Attachment No ▾

Stop Processing Emails on First Error Yes ▾

OK Cancel

To **manage** the Incoming Email Settings for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Click on the **Manage** link to the right of **Incoming Email Settings**
6. The current Incoming Email Settings will be displayed.

If a **<Pulldown Name> <Option Menu Item> Incoming Email Settings** field is displayed (where <Pulldown Name> is the name of the selected pulldown field and <Option Menu Item> is one of the option menu items in the selected pulldown), this indicates that the Incoming Email Settings are different for each option menu item in a particular pulldown field. If the **<Pulldown Name> <Option Menu Item> Incoming Email Settings** field is not displayed, this indicates that the Incoming Email Settings are not different for each option menu item in a pulldown (the same settings will be applied to all records submitted with this combination of Project and Form). The pulldown selected in the **<Pulldown Name> <Option Menu Item> Incoming Email Settings** can be set using the [Edit Based On](#) link in the [Manage Projects](#) section.

Select an option in the **<Pulldown Name> <Option Menu Item> Incoming Email Settings** field to set the Incoming Email Settings that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the Incoming Email Settings that correspond to that selection.

The <Pulldown Name> Values field contains the following options:

- **<Default>**  
Selecting this option will allow you to choose the Incoming Email Settings that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Incoming Email Settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- Option Menu Items for the **Based On** pulldown

Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the Incoming Email Settings that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Incoming Email Settings configured for **<Default>** to be filled into the Incoming Email Settings for the option menu item selected.

### Enable Submit via Email

In order to enable the Submit via Email feature for a form, this property must be set to "Yes", which will allow records to be added to this workgroup via email.

### Mail Account User Name

Enter a unique mail account (mailbox) on the mail server specified in the "Mail Server Name" field to receive the incoming email messages. Enter the User Name for this account. Up to 80 characters can be entered into this field.

### Mail Account User Password

Enter the password that corresponds to the user account (mailbox) specified in the "Mail Account User Name" field above. Up to 40 characters can be entered into this field.

**Warning: Tracker deletes all emails that it successfully reads.** It is possible that Tracker could read (and delete) an email, but still be unable to store the full information from the email into your workgroup. If you need to keep a copy of all emails sent to a particular mailbox, do not use that mailbox for Tracker. Instead, create a new mailbox and forward copies of email from the mission critical mailbox (or create a mailing list to distribute emails to both mailboxes). In general, this is a good idea, at least until you have made certain you have configured the Submit via Email feature properly. Please contact your email administrator for information on how to set up email accounts.

### Mail Server Type

Select the type that corresponds to the mail server entered into the mail server name field below. The mail server types supported are POP3 and IMAP.

### Mail Server Name

Enter the name of the mail server to be used by default to process the incoming email messages intended for this workgroup. The mail server name can be of the form "smtp.yourcompany.com" or can be the IP Address of the machine where your mail server is installed.

### Save Email 'Subject' as

Select a field of **Text** type to which the contents of the email message's subject will be saved in the new record. The choices available are based on the Text fields created in the [Manage Fields](#) section. Choosing <None> will not save the email message's subject in any field. A **Text** field must be selected, if "Enable Submit via Email" is set to "Yes". Please note that [Field Visibility](#) settings are not enforced when a record is created via email. Thus, if the Text field selected for this option is configured such that it is not visible to certain groups on the Add page, this restriction will not be enforced for records added via email.

### Save Email 'Body' as

Select a field of **TextArea** type to which the contents of the email message's body will be saved in the new record. The choices available are based on the TextArea fields created in the [Manage Fields](#) section. Choosing <None> will not save the email message's body in any field. A **TextArea** field must be selected if "Enable Submit Record via Email" is set to "Yes". If the body of an email is not plain text (for example, it's an image, audio, or HTML file), then it will be saved as a file attachment and a note telling the user that the body was saved as an attachment will be placed in the TextArea field you selected. If the body of the email comes in multiple versions (MIME multipart/alternative format), the plain text version (if any) will be saved in the TextArea field you selected and the other alternative versions will be saved as file attachments. Please note that [Field Visibility](#) settings are not enforced when a record is created via email. Thus, if the TextArea field selected for this option is configured such that it is not visible to certain groups on the Add page, this restriction will not be enforced for records added via email.

### Default Initial State for Incoming Emails

When a new record is created by an incoming email, the Status field of the new record will be set with the state selected in this option. The state selected also determines the assignee of the new record. The user assigned to the new record will be the State Manager as determined by the State Manager settings for the combination of Form and Project set in the record (refer to the section [Managing Projects](#) for more information).

### Set Reporter by Mapping 'From' Address

You can use the email address in the 'From' field of the incoming message to set the "Reported By" field for the new record. This is done by setting this option to "Yes", which will allow Tracker to compare the email address listed in the 'From' field of the incoming message to the email addresses entered in the user profiles in the workgroup's [User Administration](#) section. If the address is not found or this option is set to "No", the incoming email will be processed according to the setting of the "Action for Unmapped Emails" option.

### Action for Unmapped Emails

Tracker can be configured to map the email address in the 'From' field of the incoming message to the email addresses entered in the user profiles in the workgroup's [User Administration](#) section. The result of this mapping will set the "Reported By" field for the new record. If the mapping does not find a match in the User Administration table OR if the option "Set Reporter by Mapping 'From' Address" is set to "No", one of the following actions can be selected to process the incoming message:

- o Selecting "<Delete Email>" will result in the incoming email message being deleted and no record will be created.
- o Selecting "<Set Reporter to Unregistered User>" will set the "Reported By" field of the new record to be the "Unregistered User". The [Unregistered User](#) is a built-in user within Tracker used to distinguish records reported by unregistered users.

### Save Attachments in Email

If the incoming message contains any file attachments, these can be saved as files attached to the new record by setting this option to "Yes". Please note that the [Add Attachments](#) user group privilege is not enforced for records that are added via email. When this option is set to "Yes", any user will be able to create a record that contains an attachment using the Submit via Email feature.

### Save Raw Email as an Attachment

Select "Yes" for this option if you wish to save the entire incoming email as a file attached to the new record. The entire contents of the email including the attachments (raw email prior to processing by Tracker) will be saved as a text file (with .txt as extension) and attached to the new record. This can be useful if some of the information in the email could not be stored in the Tracker fields you have selected (for example, if the Subject line is very long and must be truncated to be stored in the Text field you have selected).

### Stop Processing Emails on First Error

Incoming messages are processed in batches periodically by Tracker's Email Processor. If there is an issue which prevents an incoming message from being processed successfully, you can choose whether Tracker should attempt to process any remaining incoming messages. Setting this option to "Yes" indicates that Tracker should not process any additional incoming messages once an error occurs (an incoming message cannot be processed successfully).

7. Click **OK** to save the selections
8. Click **OK** to return to the Manage Projects section

To **edit the pulldown** that the Incoming Email Settings are based on:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. Click on the "+" icon to the left of the **Incoming Email Settings** section for the form you wish to modify
6. Click on the **Edit Based On** link to the right of Incoming Email Settings
7. Select a pulldown in the **Based on Pulldown** so that you can configure different Incoming Email Settings for each option menu item in this pulldown
8. Click **OK** to save your selection
9. Click **OK** to return to the Manage Projects section or click **Set Incoming Email Settings** to configure the settings for each option menu item in the selected pulldown

To **edit the Incoming Email Settings** for a specific pulldown option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project.
5. Click on the "+" icon to the left of the **Incoming Email Settings** section for the form you wish to modify
6. Click on the **Edit** link to the right of the pulldown option menu item
7. The Incoming Email Settings for the selected option menu item will be displayed.

If you are editing the settings for the option menu item **<Default>**, the Incoming Email Settings displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available when editing the settings for <Default>. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Incoming Email Settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for an option menu item in the pulldown, the Incoming Email Settings displayed will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Incoming Email Settings configured for **<Default>** to be filled into the Incoming Email Settings for the option menu item selected.

### Enable Submit via Email

In order to enable the Submit via Email feature for a form, this property must be set to "Yes", which will allow records to be added to this workgroup via email.

**Mail Account User Name**

Enter a unique mail account (mailbox) on the mail server specified in the "Mail Server Name" field to receive the incoming email messages. Enter the User Name for this account. Up to 80 characters can be entered into this field.

**Mail Account User Password**

Enter the password that corresponds to the user account (mailbox) specified in the "Mail Account User Name" field above. Up to 40 characters can be entered into this field.

**Warning: Tracker deletes all emails that it successfully reads.** It is possible that Tracker could read (and delete) an email, but still be unable to store the full information from the email into your workgroup. If you need to keep a copy of all emails sent to a particular mailbox, do not use that mailbox for Tracker. Instead, create a new mailbox and forward copies of email from the mission critical mailbox (or create a mailing list to distribute emails to both mailboxes). In general, this is a good idea, at least until you have made certain you have configured the Submit via Email feature properly. Please contact your email administrator for information on how to set up email accounts.

**Mail Server Type**

Select the type that corresponds to the mail server entered into the mail server name field below. The mail server types supported are POP3 and IMAP.

**Mail Server Name**

Enter the name of the mail server to be used by default to process the incoming email messages intended for this workgroup. The mail server name can be of the form "smtp.yourcompany.com" or can be the IP Address of the machine where your mail server is installed.

**Save Email 'Subject' as**

Select a field of **Text** type to which the contents of the email message's subject will be saved in the new record. The choices available are based on the Text fields created in the [Manage Fields](#) section. Choosing <None> will not save the email message's subject in any field. A **Text** field must be selected, if "Enable Submit via Email" is set to "Yes". Please note that [Field Visibility](#) settings are not enforced when a record is created via email. Thus, if the Text field selected for this option is configured such that it is not visible to certain groups on the Add page, this restriction will not be enforced for records added via email.

**Save Email 'Body' as**

Select a field of **TextArea** type to which the contents of the email message's body will be saved in the new record. The choices available are based on the TextArea fields created in the [Manage Fields](#) section. Choosing <None> will not save the email message's body in any field. A **TextArea** field must be selected if "Enable Submit via Email" is set to "Yes". If the body of an email is not plain text (for example, it's an image, audio, or HTML file), then it will be saved as a file attachment and a note telling the user that the body was saved as an attachment will be placed in the TextArea field you selected. If the body of the email comes in multiple versions (MIME multipart/alternative format), the plain text version (if any) will be saved in the TextArea field you selected and the other alternative versions will be saved as file attachments. Please note that [Field Visibility](#) settings are not enforced when a record is created via email. Thus, if the TextArea field selected for this option is configured such that it is not visible to certain groups on the Add page, this restriction will not be enforced for records added via email.

**Default Initial State for Incoming Emails**

When a new record is created by an incoming email, the Status field of the new record will be set with the state selected in this option. The state selected also determines the assignee of the new record. The user assigned to the new record will be the State Manager as determined by the State Manager settings for the combination of Form and Project set in the record (refer to the section [Managing Projects](#) for more information).

**Set Reporter by Mapping 'From' Address**

You can use the email address in the 'From' field of the incoming message to set the "Reported By" field for the new record. This is done by setting this option to "Yes", which will allow Tracker to compare the email address listed in the 'From' field of the incoming message to the email addresses entered in the user profiles in the workgroup's [User Administration](#) section. If the address is not found or this option is set to "No", the incoming email will be processed according to the setting of the "Action for Unmapped Emails" option.

**Action for Unmapped Emails**

Tracker can be configured to map the email address in the 'From' field of the incoming message to the email addresses entered in the user profiles in the workgroup's [User Administration](#) section. The result of this mapping will set the "Reported By" field for the new record. If the mapping does not find a match in the User Administration table OR if the option "Set Reporter by Mapping 'From' Address" is set to "No", one of the following actions can be selected to process the incoming message:

- o Selecting "<Delete Email>" will result in the incoming email message being deleted and no record will be created.
- o Selecting "<Set Reporter to Unregistered User>" will set the "Reported By" field of the new record to be the "Unregistered User". The [Unregistered User](#) is a built-in user within Tracker used to distinguish records reported by unregistered users.

**Save Attachments in Email**

If the incoming message contains any file attachments, these can be saved as files attached to the new record by setting this option to "Yes". Please note that the [Add Attachments](#) user group privilege is not enforced for records that are added via email. When this option is set to "Yes", any user will be able to create a record that contains an attachment using the Submit via Email feature.

### Save Raw Email as an Attachment

Select "Yes" for this option if you wish to save the entire incoming email as a file attached to the new record. The entire contents of the email including the attachments (raw email prior to processing by Tracker) will be saved as a text file (with .txt as extension) and attached to the new record. This can be useful if some of the information in the email could not be stored in the Tracker fields you have selected (for example, if the Subject line is very long and must be truncated to be stored in the Text field you have selected).

### Stop Processing Emails on First Error

Incoming messages are processed in batches periodically by Tracker's Email Processor. If there is an issue which prevents an incoming message from being processed successfully, you can choose whether Tracker should attempt to process any remaining incoming messages. Setting this option to "Yes" indicates that Tracker should not process any additional incoming messages once an error occurs (an incoming message cannot be processed successfully).

8. Click **OK** to save the selections
9. Click **OK** to return to the Manage Projects section

## Form Order

When a project has multiple forms in use, the order in which the forms are displayed in the Form field can be set using the Order field.

To **set the order** of a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Select a project in the **Projects** pulldown at the top. The page will be refreshed with the properties of the selected project
5. Click on the **Manage** link to the right of **Available Forms**
6. Click on a form in the **Forms In Use** column
7. Click on the **Properties** button
8. Enter a number in the **Order** field to determine the order the form will be displayed in the Form field with respect to other forms. Entering the same order for multiple forms will sort the forms alphabetically.
9. Click **OK** to save the change
10. Click **OK** to return to the Manage Available Forms section

## Global Project Properties

Global Project Properties allow you to choose the name of the Project field and the Help Description displayed in Tracker pages such as Add, Edit and Task. The Help Description is the text that appears when the user places the cursor over the Help Description icon (yellow question mark to the left of the field).

To set the **Global Properties** of the Project field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Projects** button
4. Click on the **Edit Global Properties** link in the upper right corner
5. Enter a name in the **Project Label** field
6. Enter a description in the **Help Description** field
7. Click **OK** to save the changes

## Overview

Tracker allows you to create multiple forms in a single workgroup. There can be a maximum of 32 forms in a workgroup. This allows you to manage different sets of data in a central location. Some examples:

1. In an issue tracking workgroup you may wish to have separate forms to submit bugs vs. enhancements where slightly different fields are captured for each (e.g. a "Severity" level is selected for bugs, but not is not applicable for enhancements)
2. In a support workgroup you may wish have a form to save customer contact information (phone number, email address, etc.) in addition to the form used to submit support tickets

Each form can have its own set of fields. Fields can overlap in multiple forms (e.g. the bug and enhancement forms mentioned in example 1 above can have fields that are shared on both forms). Each form can be associated with one or more workflows or no workflow at all. For example, in example 1 above, you may wish to have a different workflow for bugs vs. enhancements. In example 2, support tickets have a workflow, but customer contacts entered into the workgroup do not follow a workflow.

A Default Form is created in each workgroup. The name of the default form depends on the template that was used to create the workgroup. For example, the Product Development template has the "Issue Form" created by default and the Help Desk template has the "Ticket Form" created by default. Information about the default settings in a particular template can be found in the template list in the [Putting It All Together](#) section.

If only one Form is defined in Tracker, users will not see the **Form** field on any of the pages (Add, Edit, Task, Query, Home, etc.) until additional forms are added to the workgroup. Only users that are members of the Admin group (or are members of a user group with the Admin privilege) will see the Form field in the Admin section.

### Forms List

[Edit Global Properties](#)

OK

Add Form

Options	Form Name ( Form )	Short Name	Order	Primary Key Field	Secondary Key Fields	Used In Workflow	Workflows
<input type="button" value="Edit"/> <input type="button" value="Fields"/> <input type="button" value="Delete"/>	Support	SUP	5	PRN	Title	Yes	Support
<input type="button" value="Edit"/> <input type="button" value="Fields"/> <input type="button" value="Delete"/>	Record Form	REC	10	PRN		Yes	Default Workflow , Empty Workflow

OK

Add Form

## Adding a Form

To **add** a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Add Form** button
5. Enter a name for the form you are creating in the **Name** field.

Enter a short name for the form you are creating in the **Short Name** field; this will be used to display the record number. For example, if you enter "BUG" as the short name for a form intended for reporting bugs, a record reported using this form will have the record number displayed as "BUG7" where BUG is the short name and 7 is the record number (PRN).

If you are using a case-sensitive SQL Server or Oracle database, the Short Name will be case sensitive. For example, if you enter "BUG" as the short name for a form in a workgroup that uses a case-sensitive SQL Server or Oracle database, users will only be able to access the records using the short name exactly as it is entered (e.g. they can reach record 1 by typing in "BUG1", but will not be able to access the record when typing in "Bug1" or "bug1").

You have the option to have one form that has an "empty" Short Name. When the Short Name is empty, you can access records created using this form by only referencing the PRN (for example, typing in "1" when prompted to select a PRN instead of having to enter the Short Name + PRN as in "BUG1").

Enter a number for the **Order** of this form with respect to other forms. Forms with the same number will be ordered alphabetically.

Enter any integer equal to or greater than "0" in the **First Record Number** field to be the number of the first record created in this workgroup. Each new record will be automatically assigned a number sequentially starting from the value listed for this preference. For example, if "BUG" is the **Short Name** of the form and "100" is entered for this preference, the number of the first record created will be "BUG100" and the number of the second record will be "BUG101". The default value for this preference is "1".

This value for this form can only be changed when there are no records present for this form in the workgroup. If you wish to change the value of this setting after records for this form have already been created, you must first [delete all records that were added using this form](#), then change the value of the "First Record Number" option. To delete all records that were added using this form, refer to the instructions in section called [Permanently Deleting Multiple Records](#).

Select a field to be the **Primary Key Field** field. Primary keys are used to link records to multiple forms. When linking a record to another form, the primary key is used to choose a set of records. For example, let's say you have 2 forms in your workgroup: one form for bugs / enhancement requests reported to the Product Development organization and another form for Support issues reported to the Support organization. There may be cases where you want to link a Support record to a bug/enhancement record. Let's say you selected PRN as the Primary Key Field for the bug/enhancement form. When searching for which bug/enhancement record to link to a Support record, the PRN (the field selected as the Primary Key) will be displayed to help you select the desired bug/enhancement record.

For Link fields, when PRN is selected as the Primary Key, the records will be sorted according to the numeric component of the PRN field (e.g. "1" and "2" will be used to sort the records "REC1" and "REC2", the "REC" part will be ignored in the sort order). If something other than PRN is selected as the primary key, the records will be sorted in alphabetical order based on the string (e.g. "1", "10", "2", "20", etc.).

Also when Link fields are available on a form, the fields that are selected as Primary and Secondary Key fields will not be subject to Field Visibility settings. In other words, if you have set a field such that it is not visible to certain user groups in certain areas (Add/Edit/Task pages, Query/Home reports, etc.), but the field is either a Primary or Secondary Key Field, the field will be visible to users when they use the Link field. To prevent users from seeing the field, you can either not use the field as a Primary or Secondary Key Field for the form or you can configure the Link field so that it is not visible to certain user groups using the information in the [Field Visibility](#) section.

If desired, select either the PRN field or Title to be the Primary Key Field. Select "<None>" if a primary key field should not be applied to the form.

If desired, select fields to be **Secondary Key Field 1** and **Secondary Key Field 2** for this form. Secondary keys provide more information when linking records to multiple forms. Up to 2 Secondary keys can be selected for a form. For example, let's say you have 2 forms in your workgroup: one form for bugs / enhancement requests reported to the Product Development organization and another form for Support issues reported to the Support organization. There may be cases where you want to link a Support record to a bug/enhancement record. Let's say you selected PRN as the Primary Key Field and Title as a Secondary Key Field for the bug/enhancement form. When searching for which bug/enhancement record to link to a Support record, the PRN (the field selected as the Primary Key) and Title (Secondary Key) will be displayed to help you select the desired bug/enhancement record.

If desired, select a field for Secondary Key Field 1 or Secondary Key Field 2. Fields of the [following types](#) can be used as Secondary key fields: Text, Integer, Float, Date, Pulldown, RelNum, Url and YesNo. Select "<None>" if a secondary key field should not be applied to the form.

Select a project that will be associated with this form in the **Project** field. The projects available for selection are the projects that have been created in the [Manage Projects](#) section. You can associate this form with additional projects at a later time using the steps in the [Manage Projects](#) section.

Select "Yes" if the form should be used as part of one or more workflows in the **Used in Workflow** field. Select "No" if the form should not be used as part of any workflows. If you never intend to use a Workflow (states, transitions, automatic assignment and email notifications) with the form, select "No". Selecting No will set the visibility for system required fields (Product, Status, Reported By, Assignee) such that no groups besides Admin can see or access these fields. Select "Yes" if you ever intend to use this form with a Workflow. A [Workflow](#) allows you to set up states, transitions, automatic assignment and email notifications when records are submitted using the form.

Select a workflow for this form in the **Workflow** field. A workflow can only be selected if "Yes" was selected for **Used in Workflow**. The workflows available for selection are the workflows that have been created in the [Manage Workflows](#) section. You can associate this form with additional workflows at a later time using the steps in the [Manage Workflows](#) section. If you do not wish to select an existing workflow (e.g. you plan to create one for this form at a later time), you can select "Empty Workflow". Empty Workflow is a Workflow that has only one state called "Not Applicable", has no transitions or email rules and has TBD as a state manager for the "Not Applicable" state (the state manager cannot be changed). If you wish to create a new workflow for the form you are adding, select the "<Create New Workflow>" option.

6. Click **Continue** to proceed
7. Enter a number for the **Project Form order** field. This will be used to order the forms available in the Form field on the Add and Submit pages. Forms with the same order number will be ordered alphabetically.

Select the user groups to which this form should be available in the **Make Visible (Available) To These User Groups** field. To select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting user groups. To select all user groups, click on the **All** button to the right of the field. To de-select all user groups, click on the **None** button to the right of the field. The Admins user group is not available for selection because that user group is given visibility to all forms.

If you selected "<Create New Workflow>" for the **Workflow** field, enter a name for the new workflow in the **Workflow Name** field. Select the states that should be part of the new workflow in the **Include These States** field. To select multiple states, hold down the **Ctrl** button on your keyboard while clicking on the states.

Select a state group in the **Form's Allowed Add States** field. Allowed Add States are the group of states that will be available for selection in the Status field on the Add and Submit Pages for this combination of Project and Form (when the Status field is visible on those pages).

Select a state for the **Form's Default Add State** field. The Default Add State is the state selected in the Status field by default when records are added using this combination of Project and Form.

8. Click **OK** to save the new form
9. A confirmation page will be displayed. Click [Manage Fields for this Form](#) if you wish to [set the fields](#) for the newly added form or click **OK** to return to the Manage Forms page.

## Editing a Form

To **edit** a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Edit** button to the left of the form you wish to modify
5. Make any desired changes to the form's attributes (described in the [adding a form](#) section).
6. Click **OK** to save the changes

## Deleting a Form

Before a form can be deleted, it must first be removed from any projects and workflows where it is in use (and, as a result, all records added with this form must also be removed).

To **delete** a form:

1. Login to the [workgroup](#) as Admin

2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Delete** button to the left of the form you wish to delete
5. Click **OK** to confirm the operation. If the form is currently being used by any projects, you will be prompted to remove the form from specific projects.
6. Click on the **Admin** icon
7. Click on the **Manage Projects** button
8. Select a project in the **Projects** pulldown at the top
9. Click on the **Manage** link to the right of the **Forms** section
10. Click on the form in the "Forms In Use" column and click on the **Remove** button. Click **OK** to confirm the operation. A warning will be displayed to note that removing the form from the project will remove all its records (with related information such as History, Attachments, Record Security, Source Code Files, Alerts, Discussion Threads, etc.) as well as permanently remove any related State Manager and Incoming Email settings. Click **OK** to remove the form from the project. Click **OK** again when the confirmation is displayed.
11. Click on the **Admin** icon
12. Click on the **Manage Forms** button
13. Check whether the form has any workflows listed in the **Workflows** column. If there are any workflows listed, you will need to remove the form from those workflows before you can delete it
14. Click on the **Admin** icon
15. Click on the **Manage Workflows** button
16. Select a workflow in the **Workflows** pulldown
17. Click on the **Manage** link to the right of the **Forms** section
18. If the form is not the only form associated with the workflow, click on the form and click on the **Remove** and proceed to the next step. Click **OK** to confirm the operation. A warning will be displayed to note that remove the form from the workflow will permanently remove all its related Transitions, Default Add State Settings, Email Common Content, Alerts and Outgoing Email Rules. Click **OK** to proceed. Click **OK** when the confirmation page is displayed

If the form is the only form associated with this workflow, you will need to delete the workflow in order to be able to delete the form (as a workflow cannot exist without at least one form). To delete the workflow, click on the **OK** button to return to the Workflow page. Click on the **Delete** button to the right of the **Workflows** pulldown and click **OK** to confirm the operation. A warning will be displayed to note that deleting the workflow will permanently remove all its related Transitions, Default Add State Settings, Email Common Content, Alerts and Outgoing Email Rules. Click **OK** to proceed. Click **OK** when the confirmation page is displayed. Skip to the next step.

19. Click on the **Admin** icon
20. Click on the **Manage Forms** button
21. Click on the **Delete** button to the left of the form you wish to delete
22. Click **OK** to confirm the operation. Click **OK** again to confirm the operation
23. Click **OK** when the confirmation is displayed

## Fields

You can select which fields are available on each form

To **set the fields** for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Fields** button to the left of the form to which you want to add fields
5. The **Fields Used By This Form** column contains any fields that are currently used by the form. The fields PRN, Status, Reported By, Assigned To, Deleted? and Product are used by every form and cannot be removed. Fields marked with a \* are fields that use [global properties](#). If you wish to change a field such that it no longer uses global properties, [edit the field's properties](#).

The fields in the **Available Global Fields** column are fields that are not currently used by the form.

To add a field to the form, click on the field in the **Available Global Fields** column, then click on the **Add** button. To remove a field so that it is no longer used by the form, click on the field in the **Fields Used By This Form** column, then click on the **Remove** button.

A new field can be added by clicking on the **Add Global Field** button. Review the [Managing Fields](#) Help section for details about adding a new field.

6. Click **OK** to return to the Manage Forms page.

## Removing and Re-adding Fields to a Form

When a field is removed from a form, all values in that field in the records created using that form will be removed. If later the field is re-added to the form, the field's value in all records created using the form will be set to its default (the old values from before the field was removed will not be preserved). Values of the field in records created using other forms will not be affected.

## Editing Field Properties

The fields that are used by a form can have Global Field Properties or be modified such that they have different properties when the field appears in each form. Global Field Properties are the properties set for the field in the [Manage Fields](#) section.

To **edit** a field's properties from the Fields section of a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Fields** button to the left of the form to which you want to edit fields
5. Click on a field in the **Fields Used By This Form** column, then click on the **Edit** button
6. The properties of the selected field will be displayed. When the box for the property **Use Global Field Properties** is checked, this indicates that the properties set for the field in the [Manage Fields](#) section will be applied to this field on all forms. Unchecking the box for the Use Global Fields Properties option will allow you to set the field's properties for the selected form. An explanation of the available properties for the fields by field type can be found in the [Manage Fields](#) Help section.
7. Click **OK** to save any changes to the field properties

## Global Form Properties

Global Form Properties allow you to choose the name of the Form field and the Help Description displayed in Tracker pages such as Add, Submit, Edit and Task, Query, Home, etc. The Help Description is the text that appears when the user places the cursor over the Help Description icon (yellow question mark to the left of the field).

To set the **properties** of the Form field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Forms** button
4. Click on the **Edit Global Properties** link in the upper right corner
5. Enter a name in the **Form Label** field
6. Enter a description in the **Help Description** field
7. Click **OK** to save the changes

 <b>NetResults Tracker</b> <span style="float: right;"></span>
<b>Managing Fields</b> <span style="float: right;"> <input type="button" value="Help Topics"/> <input type="button" value="&lt;&lt;"/> <input type="button" value="&gt;&gt;"/> </span>

## Overview

Tracker allows you to customize forms to suit your needs by adding and removing fields as necessary. In addition, you can specify the name displayed for all fields and other properties of each field such as whether a field is required or not and on which pages the field will appear.

The fields listed can be sorted by **Field Label**, **Order** or **Field Type** by clicking on the corresponding column heading on the Global Fields List.

## Adding Fields

It is often a good idea to [create a backup](#) of your database before making major changes such as modifying your fields as some modifications are irreversible other than by restoring backup copy of your database.

To **add** a new field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Add Field** button
5. Select the field type you wish to add, then click **Continue**
6. Make selections for the field's properties The properties available for each field type are described in the [Field Types](#) section.
7. Click **OK** to save the field or click **Continue** if you are adding a Link type field. If you are adding a Link type field, make selections for the Reverse Link Field properties, then click OK to proceed
8. A confirmation page will be displayed. Click on the **OK** button to return to the Manage Fields section or click [Set Forms](#) to select which forms in which the field will be included.

## Deleting Fields

Before you can delete a field, you must first remove it from any forms in which it is being used.

To **delete** a field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Forms** button
5. Click on a form in the "Forms Using This Field" column, then click on the **Remove** button
6. Click **OK** to confirm this operation. Click **OK** again to confirm.
7. Click **OK** when the confirmation is displayed. Click **OK** again to return to Field list
8. Click on the **Delete** button to the left field you wish to remove. Click **OK** to confirm, click **OK** again to confirm, click **OK** when the confirmation page is displayed.

## Removing and Re-adding Fields to a Form

When a field is removed from a form, all values in that field in the records created using that form will be removed. If later the field is re-added to the form, the field's value in all records created using the form will be set to its default (the old values from before the field was removed will not be preserved). Values of the field in records created using other forms will not be affected.

## Global Fields List

OK

Add Field

Options	Field Label	Order	Field Type	Forms
Edit Forms	PRN	0	Record ID (Integer)	<All>
Edit Forms Delete Items	Request Type	10	Pulldown	Issue
Edit Forms Items	Status	10	State (Status)	<All>
Edit Forms Items	Reported By	20	Reporter	<All>
Edit Forms Delete	Title	20	Text	Issue , Ticket
Edit Forms Items	Assigned To	30	Assignee	<All>
Edit Forms	Deleted	40	Deleted (YesNo)	<All>
Edit Forms Delete	Description	40	TextArea	Issue
Edit Forms Delete	Workaround	40	TextArea	Issue
Edit Forms Items	Product	50	History Pulldown	<All>
Edit Forms Delete	Date Reported	60	Date	Issue
Edit Forms Delete Items	Priority	65	Pulldown	Issue
Edit Forms Delete Items	Platform	70	Pulldown	Issue

## Effects on Existing Records when Adding and Removing Fields

When you add a field, all existing records will be given an initial value. For pulldown menus and release numbers, the current default value (refer to the [Customizing Menu Items](#) Help section) for the pulldown or release number is used as the initial value. For Date, Text, TextArea, and URL fields, the initial value is blank (no value). For integer and float fields, it is zero. For YesNo fields, it is the current default value (see [Editing Field Attributes](#)).

Fields that are removed from Tracker are no longer displayed, but they actually remain in the database. Additionally, when a field is removed, any references to the field (in Saved Queries, Report Layouts, and Task Fields) are removed. Records which are added after you have removed a field do not get a value for the removed (inactive) field.

If you have configured [Dependent Pulldowns](#), removing one of the pulldowns removes the relationship between the two pulldown fields. If a parent pulldown is removed, the child option menu items become independent, and thus, are no longer limited by the value entered in the parent pulldown.

If you wish to have all records in the system start with the same value for this newly added field (for example, you have a special value to note that the value wasn't actually set when the record was first created), you can use the **Edit Results** function to update all records after you add the field. The [Query Results](#) Help section of the [User Help Guide](#) has for more information on the Edit Results function.

If a field is renamed (the **Label** property for the field is changed), there is no impact to existing data. The labels on the various pages (Add, Edit, Task, View, Query, etc.) will change to use the new label.

## Editing Field Properties

The properties set for a field when created or edited in the Manage Fields section are known as [Global Field Properties](#). When a field is added to a form, the field can use its global field properties or the field can be modified such that it has different properties when it is used by each form. For example, you may want to configure a field such that it is required on the Add page on one form, but not required on the Add page for another form.

To **edit** a field's properties from the Set Forms section:

1. Login to the [workgroup](#) as Admin

2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Forms** button to the left of the field
5. The **Forms Using This Field** column displays any forms which include the selected field. Forms marked with a "\*" indicate that the form uses the global field properties for the field. Click on a form in the Forms Using This Field column, then click on the **Edit** button.
6. The properties of the selected field will be displayed. When the box for the property **Use Global Field Properties** is checked, this indicates that the properties set for the field in the Manage Fields section will be applied to this field on the selected form. Unchecking the box for the Use Global Fields Properties option will allow you to set the field's properties for the selected form. An explanation of the available properties for the fields by field type can be found in the [Field Types](#) section.
7. Click **OK** to save any changes to the field properties

## Editing Field Attributes

To **edit** the attributes for a field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Edit** button to the left of the field you wish to modify
5. Make changes to the attributes (details of the available options are explained below)
6. Click on the **OK** button to save your changes

**Edit Global Text Field: Title**

Label

Record Order

Required for Add & Submit  Yes  No

Include in Submit Page  Yes  No

Copy Field value for Next Add  Yes  No

Display Next Field Inline  Yes  No

Reporter Email Address  Yes  No

Fixed Width Font  Yes  No

Input Width

Maximum Number of Characters

AutoFill Item

AutoFill Alternate Value

Help Description   
( Displayed on Add, Edit and Task pages )

## Selecting Forms for a Field

A field must be added to at least one form in order to be in use in Tracker. The fields PRN, Status, Reported By, Assigned To, Deleted and Product are required for all forms. The Forms option is not available for these fields in the Manage Fields section.

To **set the forms** for a field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Forms** button to the left of the field
5. Any forms in which the field is already included will be listed in the **Forms Using This Field** column. Any forms in which the field is not yet included will be

listed in the **Available Forms** column. The forms which are listed in the Available Forms column for selection are determined by the forms created in the [Manage Forms](#) section.

To add the field to a form, click on the form in the Available Forms column, then click on the **Add** button. To remove a field from a form, click on the form in the Forms Using This Field column and click on the **Remove** button.

6. Click **OK** to return to the Manage Fields section

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## Editing Items for a Field

The Assigned To, Reported By, Status fields as well as the Pulldown and Release Number fields have an **Items** button available for modifying the options available in those fields. Details on editing items for Pulldown and Release Number fields are available in the [Customizing Menu Items](#) section.

The Items button for the **Assigned To** field will display the [User Administration](#) section. Items listed in the Assigned To field are the users listed in the User Administration section. For a user to be available in the Assigned To field on the Add Page, the user must be a member of a user group with the privilege "Can Be Assignee For Add". For a user to be available in the Assigned To field on the Edit Page, the user must be a member of a user group with the privilege "Can Be Assignee For Edit".

The Items button for the **Reported By** field will display the [User Administration](#) section. Items listed in the Assigned To field are the users listed in the User Administration section.

The Items button for the **Status** field will display the [Global States List](#). Items listed in the Status field are the states created in the Global States List.

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## Field Types

Tracker has the following field types available. Click on the field type to see the description and the global field properties that can be set for each field type. Fields marked with \* are system required fields that cannot be deleted and will be present in all forms. Any number of non-system global fields can be created, but only a limited number can be used per form (see each field type below for the allowed number).

- [Assignee \\*](#)
- [Date and Time](#)
- [Deleted \\*](#)
- [Float](#)
- [Integer](#)
- [Link](#)
- [PRN \\*](#)
- [Product \\*](#)
- [Pulldown](#)
- [Release Number](#)
- [Reporter \\*](#)
- [Status \\*](#)
- [Text](#)
- [TextArea](#)
- [Url](#)
- [YesNo](#)

---

## Assignee

One Assignee field is available. This field cannot be deleted. Non-restricted users present in the User Administration section can be displayed as options in this field. Which users are available in this field when performing various operations depend on the workflow settings and user group privileges.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the

new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all of the fields on a [form](#) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the detail is the information entered here in the Help Description option). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

#### Edit Page (Update) Visibility

#### Edit Page (Read Only) Visibility

#### View Page Visibility

#### Home/Query Page Visibility

#### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Date and Time

A string of the format MM/DD/YYYY HH:MM:SS AM/PM (US Default). Other formats can be used based on the end user's [Preferences](#). The default value for this field type is controlled by the "Initialize On Add" option below. Maximum of 10 Date fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Required for Add & Submit

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Date fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

### Initialize on Add

Specifies that if the date field appears on the Add page, it should be automatically initialized to the current date/time when the Add button is clicked to save the new record. Fields with this attribute set to Yes will also be initialized if [Add Similar](#) operation is used to create a new record.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

**Display Next Field Inline**

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. In the Query Page, Date fields will always be displayed on a separate line because of the additional options available for selecting date criteria. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility****View Page Visibility****Home/Query Page Visibility****Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

**Deleted**

One Deleted (YesNo) type field called "Deleted" is available and it cannot be deleted. This field can be used to mark records as deleted by setting its value to "Yes" (soft delete).

**Label**

The name displayed for this field.

**Record Order**

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

**Include in Submit Page**

Specifies whether the field should be presented on the [Submit Page](#).

**Copy Field Value for Next Add**

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

**Display Next Field Inline**

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**Display Style**

This field determines how the choices within the field are displayed and has different options depending on the field type. For a Pulldown type field, the choices are "Pulldown", "Radio" and "Vertical Radio". For a YesNo type field, the choices are "Pulldown" and "Checkbox".

**Default Value**

Specifies the default value for a YesNo type field. The values that can be selected are "Yes" or "No".

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility****View Page Visibility****Home/Query Page Visibility****Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

**Float**

A floating point number. The default value for this field is "0.0". However, if the field is set to be required on the Add page, the default value when it appears on the Add page is "(blank)". This field type will accept positive and negative values. Maximum of 5 Float fields can be used per form.

**Label**

The name displayed for this field.

**Record Order**

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

**Required for Add & Submit**

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Float fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

**Include in Submit Page**

Specifies whether the field should be presented on the [Submit Page](#).

**Copy Field Value for Next Add**

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

**Display Next Field Inline**

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility****View Page Visibility****Home/Query Page Visibility****Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field](#)

[Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Integer

An integer numeric value. The default value for this field is "0". However, if the field is set to be required on the Add page, the default value when it appears on the Add page is "(blank)". This field type will accept positive and negative values. Maximum of 5 Integer fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Required for Add & Submit

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Integer fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Link

Link fields allow you to cross-reference PRNs. For example, you could create a link field called "Related PRNs" that allows you to associate other PRNs to a particular PRN (e.g. if there are multiple PRNs that report the same issue). Another way to use link fields is when you are using [multiple forms](#). For example, if you

have a form for development issues and another form for support tickets, you can use a link field to reflect support tickets related to a particular development issue and vice versa. The sample below shows a link field called "Related Support PRNs" to link Support PRNs to Development PRNs. With link fields a search can be done to narrow down the list of possible PRNs to be linked. The list in the sample below are the Support PRNs with chart in the Title where Title is the Secondary Key Field for the form (as set in the [form's properties](#)).

The screenshot displays the 'Product Development Tracker (pteval) - Microsoft Internet Explorer' interface. The browser's address bar shows the application name. The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains icons for Home, Query, Task, Add, Edit, View, Discuss, Delete, Metrics, History, Order, Logoff, and Help. The status bar indicates 'Ready' and 'Help'.

The main content area is titled 'Add Record' and includes a 'Go To Last Query Results' link. Below this are 'Add' and 'Add & Copy' buttons. A note states: 'Fields marked with \*, Bold and Color are required.' The form fields are as follows:

- Project:** Default Project (dropdown)
- Form:** Record Form (dropdown)
- Title \***: Chart Wizard (text input)
- Product:** Product-1 (dropdown)
- Platform:** Radio buttons for None, <All>, Windows 2000, Windows 2003, Windows XP
- Reported in Version:** Four dropdown menus with values 1, 2, 3, 4
- Severity:** 2-Medium (dropdown)
- Priority:** 2 (dropdown)
- Description \*:** Text area containing '==== 11/16/2006 08:19:23 PM [UTC+0000] ==== Developer One ==== Add a chart wizard'. Includes an 'Annotate >' button.
- Workaround:** Empty text area. Includes an 'Annotate >' button.
- Related Support PRNs:** A search window is open over this field. The search term is 'chart'. It shows '2 items found': SUP0 (Need a chart wizard) and SUP1 (Wizard for charts). Includes 'Add' and 'Cancel' buttons.
- Status:** Reported (dropdown)
- Assigned To:** Development Manager (dropdown)

At the bottom, there are 'Options' checkboxes: 'Add Attachment(s)' (unchecked), 'Set Alert' (checked), and 'Start Discussion' (unchecked). 'Add' and 'Add & Copy' buttons are also present at the bottom of the form.

PRNs can be added to a Link Field on the Add, Edit and Submit pages as well as during the Task operation. Link Fields can be viewed on the View Page, Email Notifications, Query and Home Page results as well as the Knowledge Base. Link Fields cannot be included as part of Query criteria, cannot be changed while editing a set of query results and cannot be used as a sort field for Query results.

If [Record Visibility](#) is enabled, it will be applied when a search for or viewing items in a Link Field.

**Label**

The name displayed for this field.

**Record Order**

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

**Required for Add & Submit**

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Link fields this means that at least one item must be selected in the field.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

**Include in Submit Page**

Specifies whether the field should be presented on the [Submit Page](#).

**Copy Field Value for Next Add**

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

**Display Next Field Inline**

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**To Forms**

Select the form(s) to which a PRN can be linked. The form selected will determine which items can be selected as links for a PRN on the Add, Edit and Task pages.

**Maximum Allowed Link Items**

Enter a number to determine the maximum number of items that can be linked to a PRN. Enter "0" to allow unlimited items to be linked.

**Maximum Link Items Displayed**

Enter a positive number to determine the maximum number of items to be displayed when searching for possible items to link to a PRN. If a search returns more items than the maximum number entered for this option, the search box will display "X items found, first Y items displayed" where X is the actual number of items that matched the search (and X is greater than the maximum number of link items entered for this option) and Y is the maximum number of link items entered for this option.

**Include Link Items From**

This option determines whether the available items to be linked to a PRN should be from any project or should be limited to only those items within the same project selected for a PRN. Select "All Projects" to allow any item to be linked or select "Same Project" to limit the list of available items to only those that belong to the same project selected for the PRN.

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility****View Page Visibility****Home/Query Page Visibility****Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) and the [Link Fields and Field Visibility](#) sections for more information about configuring these options.

## Reverse Link Properties

After making selections, click on the **Continue** button to make selections for the Reverse Link Properties of the Link field. A reverse link is the link field that will be available in the form(s) selected in the **To Forms** property of the [Link Field](#) you created. Using the [Link Sample](#), the Link Field is "Related Support PRNs" and is displayed on the form for submitting development issues. The Reverse Link is "Related Dev PRNs" and is displayed on the form for submitting support tickets as shown in the sample below.

**Product Development Tracker (pteval) - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Status Ready [Go To Last Query Results](#)

**Add Record**

[Add](#) [Add & Copy](#)

Project: Support

Title: System error when creating a new history database

Product: Our Browser

Platform: Windows NT

Reported In Version: 1 . 2 . 3 . None

Request Type: Bug

Severity: 4 (Med Impact - High %)

Description:
   
==== 11/30/2006 11:20:16 AM [UTC-0800] ==== Support One ====
   
User is getting an error when trying to create a new history database.

[Annotate >](#)

Workaround:

[Annotate >](#)

Status: Reported

Assigned To: TBD

Customer: Company A

Email Address: user1@companya.com

Phone Number: 650-555-1212

Related Dev PRNs: [Add Items >](#) [Delete](#)

Options:
   
 Add Attachment(s)
   
 Set Alert
   
 Start Discussion

[Add](#) [Add & Copy](#)

[Add](#)[Add & Copy](#)**Label**

The name displayed for the reverse link field (e.g. the field available on the form(s) selected in the **To Form** property of the Link Field).

**Show this Reverse Link**

Select whether the reverse link should be available on the form(s) selected in the **To Form** property of the Link Field.

**Record Order**

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

**Required for Add & Submit**

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Reverse Link fields this means that at least one item (PRN) must be selected in the field.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

**Include in Submit Page**

Specifies whether the field should be presented on the [Submit Page](#).

**Copy Field Value for Next Add**

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

**Display Next Field Inline**

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**From Forms**

This shows the form(s) in which the reverse link will be available.

**Allow Link Items to be Set**

Select "Yes" if link items can be selected for the reverse link field (e.g. can link items be added to the Support ticket displayed in the [example above](#)). If you wish for the reverse link to be read only (no link items can be set using the reverse link field), set this to "No".

**Maximum Link Items Displayed**

This option will only be available if the **Allow Link Items to be Set** option is set to "Yes". Enter a positive number to determine the maximum number of items to be displayed when searching for possible items to link to a PRN. If a search returns more items than the maximum number entered for this option, the search box will display "X items found, first Y items displayed" where X is the actual number of items that matched the search (and X is greater than the maximum number of link items entered for this option) and Y is the maximum number of link items entered for this option.

**Include Link Items From**

This option determines whether the available items to be linked to a PRN should be from any project or should be limited to only those items within the same project selected for a PRN. Select "All Projects" to allow any item to be linked or select "Same Project" to limit the list of available items to only those that belong to the same project selected for the PRN.

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility**

**View Page Visibility**  
**Home/Query Page Visibility**  
**Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) and the [Link Fields and Field Visibility](#) sections for more information about configuring these options.

[Return to Field Types List](#)

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## PRN

One Record ID (Integer) type field called "PRN" is available and it cannot be deleted. This field is the unique numerical identifier for each record in the database.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

[Return to Field Types List](#)

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## Product

One History Pulldown type field called "Product" (this may have another name in some [templates](#)) is available. This field is a pulldown field and it cannot be deleted. This is a key field since the contents of this field are included in the Record History. You should make this field something that is important since its value can be tracked in the History. Using this field for the "Based On" property for workflow settings, email rules and alerts would be a good choice so that you can see why/how a record was routed a certain way using the information in the history.

The option menu items available in the this field can be configured using the information in the [Customizing Menu Items](#) section.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to

fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Display Style

This field determines how the choices within the field are displayed and has different options depending on the field type. The choices are "Pulldown", "Radio" and "Vertical Radio". The "Product" field is set to use "Radio", "Platform" is set to use "Vertical Radio" and "Severity" is set to user "Pulldown" in the [Add Page Sample](#).

### Parent Pulldown

This option allows you to select a pulldown field to be a parent pulldown (in a [Dependent Pulldowns](#) relationship) to the field you are creating. Selecting "<No Pulldown>" for this option indicates that this field should not have a parent pulldown.

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Pulldown

A pulldown menu. You can customize the style (pulldown, radio, vertical radio). The option menu items and default item available in a Pulldown field can be configured using the information in the [Customizing Menu Items](#) section. Maximum of 40 Pulldown fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Required for Add & Submit

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For pulldown fields, this means that the user must select a value other than the default value displayed on the form. You may wish to define the first element of a required pulldown with a value like "Please Select A Value" to indicate to the user that a non-default value must be selected before saving the new record.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to

fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Display Style

This field determines how the choices within the field are displayed and has different options depending on the field type. The choices are "Pulldown", "Radio" and "Vertical Radio". The "Product" field is set to use "Radio", "Platform" is set to use "Vertical Radio" and "Severity" is set to user "Pulldown" in the [Add Page Sample](#).

### Parent Pulldown

This option allows you to select a pulldown field to be a parent pulldown (in a [Dependent Pulldowns](#) relationship) to the field you are creating. Selecting "<No Pulldown>" for this option indicates that this field should not have a parent pulldown. This option is only available for Pulldown type fields.

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Reported By

One Reporter field is available. This field cannot be deleted. All users present in the User Administration section are displayed as options in this field. "Unregistered User" is selected in this field when a record is reported via the [Submit Page](#) or [Email](#).

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all of the fields on a [form](#) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the detail is the information entered here in the Help Description option). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

[Add Page Visibility](#)  
[Edit Page \(Update\) Visibility](#)  
[Edit Page \(Read Only\) Visibility](#)  
[View Page Visibility](#)  
[Home/Query Page Visibility](#)  
[Email Message Visibility](#)

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Release Number

A combination of four pulldown menus. You can customize all values in the menu using the information in the [Customizing Menu Items](#) section. The default value for this field is determined in the [Customizing Menu Items](#) section. Maximum of 5 Release Number fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

[Add Page Visibility](#)  
[Edit Page \(Update\) Visibility](#)  
[Edit Page \(Read Only\) Visibility](#)  
[View Page Visibility](#)  
[Home/Query Page Visibility](#)  
[Email Message Visibility](#)

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Status

One Status type field is available. This field cannot be deleted. States created in the [Manage Workflows](#) section are displayed in this field. Which states are available in this field when performing various operations depend on the workflow settings.

### Label

The name displayed for this field.

#### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

#### Include in Submit Page

Specifies whether the field should be presented on the [Submit via Web](#) form (also known as the Submit Page).

#### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

#### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

#### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

#### Add Page Visibility

#### Edit Page (Update) Visibility

#### Edit Page (Read Only) Visibility

#### View Page Visibility

#### Home/Query Page Visibility

#### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

## Text

A text string up to 80 characters. By default, this field is blank until information is added. Maximum of 20 Text fields can be used per form.

#### Label

The name displayed for this field.

#### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

#### Required for Add & Submit

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For Text fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

#### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

#### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Unregistered User Email

Specifies whether a Text type field will be used to collect the email address of an unregistered user. Only one Text type field can have this attribute set to "Yes" per workgroup. This option allows email notification messages to be sent automatically to users who have submitted issues from outside of Tracker using the [Submit Page](#) or [Submit via Email](#) features. If you are using the Submit Page, also set the option [Include in Submit Page](#) to "Yes" for the field you have designated as the Unregistered User Email so the end users can enter their email address on the form when submitting a record.

### Fixed Width Font

This option determines whether the data entered into a Text type field will be entered using a fixed width font. Selecting "Yes" will use a fixed width font such that each character is displayed with a uniform width. Selecting "No" will not use a fixed width font (characters have varying widths).

### Input Width

Enter the number of characters to be used as the display width for Text type fields. This affects the width of the field on Add, Edit, Task, View and Query pages. This does not affect the maximum number of characters that can be entered into the field. The minimum value for this option is 1 and the maximum value for this option is 80.

### Maximum Number of Characters

This option determines the maximum number of characters that can be entered into the field. For Text fields, this can be set to a maximum of 80 characters. When the [Autofill](#) option is set to something other than "<None>", this property will be set to 80 characters and cannot be changed.

### AutoFill Item

The AutoFill feature is a method of automatically collecting information about a user's system (operating system, browser type and version, IP Address, etc.) and saving it within a newly added record. The information collected about the user's environment could be useful in resolving or processing the issue reported in the record. Text type fields can be used to collect the information from a user's machine when the user submits a record using the Add or Submit pages.

By default, AutoFill is disabled for Text type fields (the AutoFill fields are set to "<None>" when disabled).

To enable the **AutoFill** feature for a Text field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Edit** button to the left of a Text type field. Or, click on the **Add** button and select "Text" as the field type and click **OK**
5. Select a parameter to be collected in the **AutoFill Item** field. The parameters available for Text and URL type fields are described [below](#).
6. Select an option in the **AutoFill Alternate Value** field to be used in cases where the value of the AutoFill item cannot be retrieved from the user's machine. AutoFill Alternate Value can be one of the following:
  - **1 - <No Value>**  
If the value of the AutoFill Item cannot be found, no value should be saved in this field as a replacement. The field will be blank in the newly saved record.
  - **2 - "Unknown"**  
If the value of the AutoFill Item cannot be found, the string "Unknown" should be saved in this field for the newly added record.
  - **3 - <Raw Value>**  
If the value of the AutoFill Item cannot be found, the raw data found in the location checked to retrieve the AutoFill Item.
7. Click **OK** to save the changes

When a field with AutoFill enabled is visible on the Add or Submit pages, the user creating the new record has the ability to overwrite the values automatically filled in these fields. Information on setting a field's visibility on the Add page can be found in the [Field Visibility](#) section.

### Available AutoFill Items

The following parameters can be collected to automatically fill a **Text** type field.

#### Host Name

The TCP / IP host name of the machine the user is logged into when accessing Tracker. **Note:** By default, the IIS web server will return the IP Address instead of the Host Name to increase performance for web hosting. If you wish to get the Host Name, please follow the steps in this [Microsoft article](#), which would configure IIS to do a reverse DNS lookup. For more information, please review your IIS documentation.

#### IP Address

The IP Address of the machine the user is logged into when accessing Tracker.

### Operating System

The Operating System installed on the machine the user is logged into when accessing Tracker.

### Screen Size

The value of **Screen Area** in the user's Monitor Display settings.

### Web Browser

The type and version of the browser(s) installed on the machine the user is logged into when accessing Tracker.

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

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## TextArea

A very large text string. The maximum size determined by the amount of data supported by the TextArea type on your web browser, and the particular database in use. By default, this field is blank until information is added. Maximum of 10 TextArea fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Required for Add & Submit

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For TextArea fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit Page](#).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

**Annotate in Add Page**

This option determines whether any additions to the TextArea field will be preceded with an annotation when the field is modified on the Add Page. The annotation includes a date and time stamp when the field was modified and the User ID of the user who modified the field. Select "Optional" if you wish to have the annotation be included in the field only when the user clicks on the **Annotate** button. Select "Automatic" if you wish to have the annotation included automatically when the field is modified. When selecting Automatic, the Annotate button will not be displayed. The annotation will be applied to the field (only if it was modified) when the record is submitted either using the **Add** or **Add & Copy** buttons. Select "Unavailable" if you do not wish to have the field annotated when it is modified.

**Annotate in Edit Page**

This option determines whether any additions to the TextArea field will be preceded with an annotation when the field is modified on the Edit Page. The annotation includes a date and time stamp when the field was modified and the User ID of the user who modified the field. Select "Optional" if you wish to have the annotation be included in the field only when the user clicks on the **Annotate** button. Select "Unavailable" if you do not wish to have the field annotated when it is modified.

**Annotate in Submit Page**

This option determines whether any additions to the TextArea field will be preceded with an annotation when the field is modified on the [Submit Page](#). The annotation includes a date and time stamp when the field was modified. Select "Optional" if you wish to have the annotation be included in the field only when the user clicks on the **Annotate** button. Select "Automatic" if you wish to have the annotation included automatically when the field is modified. When selecting Automatic, the Annotate button will not be displayed. The annotation will be applied to the field (only if it was modified) when the record is saved when the **Submit** button is clicked. Select "Unavailable" if you do not wish to have the field annotated when it is modified.

**Annotate Button Label**

Enter the label for the Annotate button which is displayed to the left of the TextArea field when "Optional" is selected for the options **Annotate in Add Page**, **Annotate in Edit Page** or **Annotate in Submit Page**. By default the button label is "Annotate >>".

**Help Description**

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

**Add Page Visibility****Edit Page (Update) Visibility****Edit Page (Read Only) Visibility****View Page Visibility****Home/Query Page Visibility****Email Message Visibility**

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

**URL**

A 255 character string that is a valid formatted URL. By default, this field is blank until information is added. Maximum of 5 URL fields can be used per form.

**Label**

The name displayed for this field.

**Record Order**

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

**Required for Add & Submit**

Specifies whether the field is required to be modified by the user when it appears on the Add or Submit pages. For URL fields this means that a blank value will not be allowed.

You may wish to highlight required fields on the Add or Submit pages with a particular color, **bold** type or with a special character (e.g. "\*\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section. The fields "Title" and "Description" are set as Required in the [Add Page Sample](#).

When this attribute is set to "Yes", the [field visibility](#) set for this field must be set such that the field is visible on the Add page to at least one user group.

**Include in Submit Page**

Specifies whether the field should be presented on the [Submit Page](#).

**Copy Field Value for Next Add**

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Fixed Width Font

This option determines whether the data entered into a Url type field will be entered using a fixed width font. Selecting "Yes" will use a fixed width font such that each character is displayed with a uniform width. Selecting "No" will not use a fixed width font (characters have varying widths).

### Input Width

Enter the number of characters to be used as the display width for Url type fields. This affects the width of the field on Add, Edit, Task, View and Query pages. This does not affect the maximum number of characters that can be entered into the field. The minimum value for this option is 1 and the maximum value for this option is 80.

### Maximum Number of Characters

This option determines the maximum number of characters that can be entered into the field. For URL fields, this can be set to a maximum of 255 characters. When the [Autofill](#) option is set to something other than "<None>", this property will be set to 80 characters and cannot be changed.

### AutoFill Item

The AutoFill feature is a method of automatically collecting information about a user's system and saving it within a newly added record. The information collected about the user's environment could be useful in resolving or processing the issue reported in the record. A URL type field can be used to collect the last browsed URL from a user's machine when the user submits a record using the Add or Submit pages.

By default, AutoFill is disabled for URL type fields (the AutoFill fields are set to "<None>" when disabled).

To enable the **AutoFill** feature for a URL field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Edit** button to the left of a Text or Url type field. Or, click on the **Add** button and select "Url" as the field type and click **OK**
5. Select the "Last Browsed URL" parameter to be collected in the **AutoFill Item** field. The Last Browsed URL is the last URL the user visited before browsing to the Tracker Login Page. The Last Browsed URL will only be set if the user clicks on a link to reach the Tracker Login Page. If the user reaches the Login Page by using a bookmark or manually typing in the URL of the Login Page, the value of the Last Browsed URL field will be blank.
6. Select an option in the **AutoFill Alternate Value** field to be used in cases where the value of the AutoFill item cannot be retrieved from the user's machine. AutoFill Alternate Value can be one of the following:
  - o **1 - <No Value>**  
If the value of the AutoFill Item cannot be found, no value should be saved in this field as a replacement. The field will be blank in the newly saved record.
  - o **2 - "Unknown"**  
If the value of the AutoFill Item cannot be found, the string "Unknown" should be saved in this field for the newly added record.
  - o **3 - <Raw Value>**  
If the value of the AutoFill Item cannot be found, the raw data found in the location checked to retrieve the AutoFill Item.
7. Click **OK** to save the changes

When a field with AutoFill enabled is visible on the Add or Submit pages, the user creating the new record has the ability to overwrite the values automatically filled in these fields. Information on setting a field's visibility on the Add page can be found in the [Field Visibility](#) section.

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

🔍 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

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## YesNo

A pulldown with the items Yes and No. The default value for this field is determined in the [Editing Field Attributes](#) section. Maximum of 5 YesNo fields can be used per form.

### Label

The name displayed for this field.

### Record Order

Integer specifying the order that the record should be presented relative to the other fields on the pages on which the field is displayed. For example, a field displayed on the Add page with a value of 5 will be listed before a field with a value of 100.

### Include in Submit Page

Specifies whether the field should be presented on the [Submit via Web](#) form (also known as the Submit Page).

### Copy Field Value for Next Add

When adding a new record using the Add page, a user has the option to click **Add** or **Add & Copy** to save the new record. Clicking on the Add button will save the new record, then return to the Add page with a "blank" form (all fields returned to default or blank values). Clicking on the Add & Copy button will save the new record, then return to the Add page with the values of the fields "copied" from the last record added. This allows the user to add another record with similar information as the last record added without having to re-type information into the fields. In order to have a field's value copied into the Add form after clicking on the Add & Copy button, the attribute **Copy Field Value For Next Add** must be set to Yes. **Note:** If all the fields that are active (present in the "In Use" column) have the "Copy Field Value For Next Add" attribute set to No, then the "Add & Copy button" button will not be displayed on the Add page.

### Display Next Field Inline

Select "Yes" if you would like the next field in the record to be displayed on the same line as the field you are editing. The next field is determined by value of **Record Order** attribute for each field. This attribute will be applied to the fields on the Add, Edit, Query, Task, Edit Query Results, and Submit pages and is only applied to fields that are visible to the user. The field "Severity" has this property set to "Yes" in the [Add Page Sample](#).

### Display Style

This field determines how the choices within the field are displayed and has different options depending on the field type. The choices are "Pulldown" and "Checkbox".

### Default Value

Specifies the default value for a YesNo type field. The items that can be selected are "Yes" or "No".

### Help Description

Enter a description of the field to be displayed on the Add, Edit, Task, and Submit pages of Tracker (in the cases where the field is set to be visible on these pages). The field help icon will be displayed when a user has the option **Display Field Help** enabled in their [preferences](#) settings. The user can move the cursor over the field help icon to see more detail about the field (the information entered here in the Field Help section). This option can also be enabled in the default preferences set in the [User Preferences](#) section.

 When a user has the **Display Field Help** option enabled, the field help icon will be displayed next to the fields on the Add, Edit, and Task pages. The user can move the cursor over the field icon to the left of the to see a description of the field. All of the fields in the [Add Page Sample](#) have Field Help configured.

### Add Page Visibility

### Edit Page (Update) Visibility

### Edit Page (Read Only) Visibility

### View Page Visibility

### Home/Query Page Visibility

### Email Message Visibility

These options are for the [Field Visibility](#) feature; they determine whether a field is available for each user group in the various areas of Tracker. Review the [Field Visibility](#) section for more information about configuring these options.

[Return to Field Types List](#)

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## Sample Add Page

Product Development Tracker (pteval) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Home Query Task Add Edit View Discuss Delete Metrics History Order Logoff Help

Status Ready Help

**Add Record** [Go To Last Query Results](#)

Fields marked with \*, **Bold** and **Color** are required.

Project

Form

**Title \***

Product  None  Product-1  Product-2

Reported in Version

None  
 <All>

Platform  Windows 2000  
 Windows 2003  
 Windows XP

Severity  Priority

**Description \***

Workaround

Status

Assigned To

---

Options  Add Attachment(s)  
 Set Alert  
 Start Discussion

**Field Visibility**

Field Visibility provides the ability to limit the fields that are visible to a particular user group in different areas such as the Add Page, Edit Page, View Page, running reports on the Query and Home Pages and the email notification messages sent from Tracker. In some circumstances, it is necessary to restrict access to a field while performing certain operations to protect sensitive information or to prevent unauthorized changes to particular fields in a record.

A field's visibility can be configured by user group for the following areas in Tracker:

- **Add Page** - determines which fields are available for each user group on the Add Page
- **Edit Page (Update)** - determines which fields are available to be modified by each user group on the Edit Page
- **Edit Page (Read Only)** - determines which fields are displayed as Read Only fields for each user group on the Edit Page
- **View Page** - determines which fields are displayed in the Fields section on the View Page for each user group. When View Page Visibility is restricted for the Product, Status or Assigned To fields, these fields will only be included in the Record History section of the View Page for user groups selected in the View Page Visibility option for each field.
- **Home/Query Pages** - determines which fields are available to be used as part of search criteria or report results for reports displayed on the Query and Home Pages
- **Email Notification Message** - determines which fields are available as part of the email notification messages sent from Tracker

The screenshot shows a configuration dialog with the following sections and options:

- Add Page Visibility:** [Managers], [QA], [RestrictedUsers], [Users], <No Group>. Buttons: All, None.
- Edit Page (Update) Visibility:** [Managers], [QA], [RestrictedUsers], [Users], <No Group>. Buttons: All, None.
- Edit Page (Read Only) Visibility:** [Managers], [QA], [RestrictedUsers], [Users], <No Group>. Buttons: All, None.
- View Page Visibility:** [Managers], [QA], [RestrictedUsers], [Users], <No Group>. Buttons: All, None.
- Home/Query Page Visibility:** [Admins], [Developers], [Managers], [QA], [RestrictedUsers]. Buttons: All, None.
- Email Message Visibility:** [Managers], [QA], [RestrictedUsers], [Users], <No Group>. Buttons: All, None.

At the bottom are 'OK' and 'Cancel' buttons.

If you wish to restrict the fields which are made visible in the Task operation, this is done while configuring task fields for a transition. The [Customizing Transitions](#) Help section provides details on configuring task fields.

Please note that when records are created using the [Submit via Email](#) feature, the field visibility settings for the Add page are not enforced on these records when they are created in Tracker.

To configure **field visibility** options for each field:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Edit** button to the left of the field you wish to modify
5. The Field Visibility fields (**Add Page Visibility, Edit Page (Update) Visibility, Edit Page (Read Only) Visibility, View Page Visibility Home/Query Page Visibility and Email Message Visibility**) display a list of the user groups in the workgroup. To set a Field Visibility field, select the user group(s) to whom the field should be visible when performing the related operation(s) (viewing reports on the Home/Query pages, submitting records using the Add form, editing records, etc.). To make a field visible to all groups, click on the **All** button. A field can be made visible to all non-Restricted users by selecting the user group "Users" (since all non-Restricted users are members of this group). Similarly, a field can be made visible to all Restricted users by selecting the user group "RestrictedUsers". To make a field such that it will not be visible to any groups, click on the **None** button or select the option <No Group>.

A user group can be selected for either Edit Page (Update) or Edit Page (Read Only), but cannot be selected for both of these areas.

6. Click **OK** to save the changes

## Field Visibility Exceptions for Required fields

When a field has the attribute **Required on Add** set to "Yes", but the field is not visible on the Add page for certain user groups, the newly added record will be saved with the field's default value. The defaults for each field type are listed in the [Field Types](#) section.

Certain fields are required for all forms, meaning that they cannot be removed from Tracker. Some field visibility settings cannot be applied to these required fields.

### PRN

This field is the record number assigned when a record is added to the database. Field visibility restrictions cannot be set for this field as it is a field that is displayed on Tracker pages to distinguish the identity of each record.

### Deleted

This field denotes whether a record has been deleted. By design, it does not appear on the Add page, and thus, field visibility for this field on the Add page cannot be set.

## Effects of Field Visibility Restrictions on Tracker operations

### Add page

When a field is not visible to a user group on the Add page, the default value will be applied to each invisible field when a member of this user group adds a record. The default values for each field type are listed in the [Field Types](#) section.

### Query and Home pages

When a field is not visible to a user group on the Query and Home pages, the field is also not visible in the personal or group Report Layouts for that user group. If a field is made Invisible for a user group and this field is already in use in a report layout for this user group, the field will be replaced with the value "Do Not Use This Column" in the report layout.

Similar actions will occur with respect to personal or group saved queries and advanced saved queries. In this case, the restricted field will not be displayed in the saved query or advanced saved query. Any fields that are not visible to the user group will have a default value applied when the query is run. In most cases, this default value is "\*", which indicates that all possible values for the field will be included in the query results even though this field will not be displayed on the query page or its results. In the case of the "Deleted" field, the default is "No", thus, all records that have not been marked deleted will be included in the query results. If the restricted field was being used as a "Sort By" field, the field will be replaced with "\*" for the Sort by value.

Additionally, with respect to personal or group saved advanced queries that were created before a field was made invisible to a user group, any clause in the **Query Phrase** section containing a restricted field will be automatically removed from the advanced saved query.

## Link Fields and Field Visibility

For Link fields, the fields that are selected as Primary and Secondary Key fields for the [form](#) in which the Link Field is available will not be subject to Field Visibility settings. In other words, if you have set a field such that it is not visible to certain user groups in certain areas (Add/Edit/Task pages, Query/Home reports, etc.), but the field is either a Primary or Secondary Key Field, the field will be visible to users when they use the Link field. To prevent users from seeing the field, you can either not use the field as a Primary or Secondary Key Field for the form (by changing the [form's properties](#)) or you can configure the entire Link field so that it is not visible to certain user groups using the information in the [Field Visibility](#) section above.

## Overview

Tracker allows you to define the option menu items of any Pulldown or Release Number field. Option menu items can be added, edited and marked obsolete or deleted at any time.

## Option Menu Item List

**Manage Menu Items for Pulldown: Priority** 6 Items

Options	Menu Item Name	Order	Add Default	Public	<input checked="" type="checkbox"/> Obsolete
<input type="button" value="Edit"/>	-select-	0	Yes	Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	1	5		Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	2	5		Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	3	5		Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	4	5		Yes	Yes
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	5	5		Yes	Yes

The Option Menu Item list shows the option menu items currently available in the pulldown. If you wish to see any option menu items that have been marked as obsolete on the Option Menu Item list, check the box to the left of the Obsolete column heading. This will refresh the list to display any obsolete option menu items.

## Defining Option Menu Items

It is often a good idea to [create a backup](#) of your database before making major changes such as modifying your pulldown menus as some modifications are irreversible other than by restoring a backup copy of your database.

The Items button for the **Assigned To** field will display the [User Administration](#) section. Items listed in the Assigned To field are the users listed in the User Administration section. For a user to be available in the Assigned To field on the Add Page, the user must be a member of a user group with the privilege "Can Be Assignee For Add". For a user to be available in the Assigned To field on the Edit Page, the user must be a member of a user group with the privilege "Can

Be Assignee For Edit".

The Items button for the **Reported By** field will display the [User Administration](#) section. Items listed in the Assigned To field are the users listed in the User Administration section.

The Items button for the **Status** field will display the [Global States List](#). Items listed in the Status field are the states created in the Global States List.

To **add** option menu items:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown field or release number field you wish to modify
5. You will be presented with a page listing all of the current items. To add a value, click on the **Add Item** button. If you clicked on the Items button for a release number (RelNum) type field, the items for the first digit will be displayed. To select another digit, make a selection in the **RelNum Type** pulldown at the top.

When adding an item you can specify:

- Name for the menu item in the **Item Label** field
- Relative order in which the item should appear in the **Order** field (all entries with the same relative order are listed alphabetically)
- Which option menu items in the parent field will be associated with this value can be selected in the **Related to Parent Pulldown Items** field. This field will only be displayed if the pulldown field to which this option menu item belongs has a parent pulldown defined in the [Managing Fields](#) section.
- Whether the value should be displayed if the field appears on the [Submit Page](#) and the [Knowledge Base Search Page](#). Checking the box marked **Value is Public** indicates the choice should appear on the Submit Page and Knowledge Base pages.

The figure below displays the attributes that can be configured when an option menu item is added. The field **Related to Parent Pulldown Items** will only appear if the pulldown field is configured as a [dependent pulldown](#).

**Add Item for Pulldown: Component**

OK Cancel

Item Label

Order

None  
Our Computer  
Our Printer

Related to Parent Pulldown Items

Value is Public

OK Cancel

To **edit** an option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown or release number field you wish to modify
5. You will be presented with a page listing all of the current items. If you clicked on the Items button for a release number (RelNum) type field, the items for the first digit will be displayed. To select another digit, make a selection in the **RelNum Type** pulldown at the top. Locate row for the option menu item you wish to modify, then click on the **Edit** button.

If you change the **Item Label** field for an option menu item, any records with this value selected will display the updated Item Label.

Changing the **order** field will change the order of the option menu item relative to other option menu items for this field.

Checking the box for the **Value is Public** option will enable an option menu item to be displayed on the [Submit Page](#) and the [Knowledge Base Search Page](#). Unchecking the option prevents the option menu item from being displayed on those pages.

Checking the box for the option **Value is Obsolete** allows you to mark an option menu item so that it is no longer

a valid value (e.g. the "obsolete" option menu item won't be available for selection on the Add, Edit, Task, and Submit pages or when using the Edit Results operation) while still allowing existing records to have the option menu item selected. For more information about marking records obsolete, review the [Maintaining Option Menu Items](#) section.

To **delete** an option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown or release number field you wish to modify
5. You will be presented with a page listing all of the current items. If you clicked on the Items button for a release number (RelNum) type field, the items for the first digit will be displayed. To select another digit, make a selection in the **RelNum Type** pulldown at the top. Locate row for the option menu item you wish to modify, then click on the **Delete** button. If any records contain the option menu item you are deleting, you will be prompted to make a selection from one of the following choices:
  - **Choose a Replacement**  
You can choose another option menu item configured for the pulldown field to replace the option menu item you are deleting in any records that contain it
  - **Mark Obsolete**  
Selecting this option allows any records that contain the option menu item you are deleting to continue to have this value. New records cannot have this option menu item selected, nor can this option menu item be selected for records that don't already have it while editing or performing the Task operation on records. If the pulldown field is part of a [dependency](#) with another pulldown, any dependencies for the option menu item you are deleting will be removed.

If any saved queries contain the obsolete value, you will be prompted to select a replacement from the list of option menu items configured for the pulldown field.

6. Click **OK** to complete the operation

To **restore** a option menu item that was previously deleted or marked obsolete:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown or release number field you wish to modify
5. You will be presented with a page listing all of the current items. If you clicked on the Items button for a release number (RelNum) type field, the items for the first digit will be displayed. To select another digit, make a selection in the **RelNum Type** pulldown at the top. Click on the **Add Item** button
6. Enter the "Item Label" for the value you wish to restore and click on the **OK** button
7. You will be prompted that the item you are attempting to add was previously deleted or marked obsolete. Click on the **Restore Item** button. If the item was previously marked as obsolete, the "Value is Obsolete" property will be unchecked for the item. Any records that had the obsolete item selected will remain unchanged.

## Selecting the Default Value for a Field

You can set which value is used as the default when a new record is added or when a field is initialized during the Task operation. You cannot delete a value if it is currently the default value. You must first set another value as the default, and then delete the value.

To change which option menu item is set as the **default**:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown or release number field you wish to modify
5. You will be presented with a page listing all of the current items. If you clicked on the Items button for a release number (RelNum) type field, the items for the first digit will be displayed. To select another digit, make a selection in the **RelNum Type** pulldown at the top. Locate row for the option menu item you wish to set as the default value, then click on the **Set Default** button

## Item Dependencies and Default items

If a pulldown field is configured to be either the child pulldown or the parent pulldown in a [Dependent Pulldowns Relationship](#), the **Item Dependencies** and Default Items buttons will be displayed above the option menu item list as shown in the figure below.

**Manage Menu Items for Pulldown: Component** 5 Items

Options	Menu Item Name	Order	Add Default	Public	<input checked="" type="checkbox"/> Obsolete
<input type="button" value="Edit"/>	Unknown	0	Yes	Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	Hard Drive	5		Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	Paper Tray	5		Yes	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Toner	5		Yes	Yes
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Set as Default"/>	Video Card	5		Yes	

In the Item Dependencies page for a pulldown menu, you can map parent pulldown option menu items to each option menu item in the child pulldown and vice versa. Instructions on mapping pulldown option menu items can be found in the [Dependent Pulldowns](#) Help section.

In the Default Items page, you can select which option menu item in the child pulldown should appear as the default value for each possible option menu item in the parent pulldown. Instructions for selecting defaults for dependencies can be found in the [Dependent Pulldowns](#) Help section.

## Maintaining Option Menu Items

When Option Menu Items become inactive, you need to decide how to reflect this in Tracker. To deactivate an option

menu item, you can either mark it as obsolete or delete it.

### Obsolete Option Menu Items

Marking an option menu item as obsolete allows records in Tracker to contain the obsolete value. This is useful in cases where you want to be able to perform searches in the Query or Metrics sections which include any obsolete option menu items as part of the search criteria or results. A preference is available to allow obsolete option menu items to be used on the Query Page. This preference can be set by default when new users are added to the workgroup in the [User Preferences](#) section or can be set by each individual user using the [Preferences](#) link available on the Home Page.

When an option menu item is marked obsolete, it cannot be selected when new records are added via the Add or Submit pages or using the Submit via Email feature. The obsolete option menu item will not be displayed as an option on the Edit or Edit Records pages or during the Task operation unless a record already has the obsolete item selected. If the original record contains an obsolete item when using the [Add Similar](#) operation to add a record, the newly added record will have the obsolete item replaced with the default value for the pulldown. If the original record contains an obsolete item when using the [Cloning](#) operation to copy a record, the clone record will also contain the obsolete item.

If the pulldown field is part of a [dependency](#) with another pulldown, when an option menu item is marked as obsolete, any dependencies involving the obsolete item will be removed. For example, let's say that Component is a parent to Sub-Component. The Component field has an option menu item called "Printer", which is related to the option menu items "Paper Tray" and "Toner" in the Sub-Component field. If the option menu item "Printer" is marked obsolete, the items "Paper Tray" and "Toner" will no longer be associated with "Printer".

When an option menu item is marked obsolete, it will still be displayed as part of Knowledge Base articles. Whether the obsolete item is available when the pulldown field is available as a filter on the Search Page depends on what is set for the "Include Obsolete Items" option in the [Search Filters](#) properties page.

### Deleted Option Menu Items

Deleting an option menu item will remove all references to the item: the deleted item will no longer be displayed on the Add, Edit, Task, View, Query, Home, Metrics pages. If there are any existing records that have the item selected, you will have the option to select a replacement for the item being deleted.

If the pulldown field is part of a [dependency](#) with another pulldown, when an option menu item is deleted, any dependencies involving the obsolete item will be removed. For example, let's say that Component is a parent to Sub-Component. The Component field has an option menu item called "Printer", which is related to the option menu items "Paper Tray" and "Toner" in the Sub-Component field. If the option menu item "Printer" is deleted, the items "Paper Tray" and "Toner" will no longer be associated with "Printer".

Deleted items can be restored using the steps in the [Restore](#) steps above.

## Overview

Dependencies can be configured between pulldown menu fields in Tracker such that the option menu values displayed in one pulldown menu can be dependent on the option menu value selected in another pulldown menu. Pulldown B is dependent on Pulldown A. When a user selects a value in Pulldown A, the values displayed in Pulldown B are changed. Pulldown A is the parent pulldown and Pulldown B is the child pulldown. A simple example to illustrate this functionality:

A system has the pulldown fields called Product and Component with the option menu values listed below.

### Product

Our Computer, Our Printer

### Component

None (default), Hard Drive, Video Card, Toner, Paper Tray

The Component field is dependent on the Product field, which results in the following behavior:

- When Our Computer is selected as the Product, the values available to be selected in the Component field are None (the default value), Hard Drive, and Video Card. This relationship is illustrated in the figure below.
- When Our Printer is selected as the Product, the values available to be selected in the Component fields are None (the default value), Toner, and Paper Tray

This behavior is achieved by configuring dependencies between the Product and Component pulldown fields.

**Add Record**
[Go To Last Query Results](#)

Fields marked with \*, **Bold** and **Color** are required.

Project

Form

**Title \***

Product     Component

Severity     Priority

**Description \***

Workaround

Status

Assigned To

**Options**

Add Attachment(s)

Set Alert

Start Discussion

Add

Add &amp; Copy

## Configuring a Pulldown to be Dependent on Another

### Selecting Fields

Select a pulldown field to be the parent pulldown, then select a pulldown field to be the child pulldown menu. Multiple dependencies on a single parent pulldown can be configured. For example, Pulldowns B, C, and D are all dependent on Pulldown A, that is to say, Pulldowns B, C, and D are all children of Pulldown A. Dependencies can be configured to span multiple levels as well. For instance, Pulldown C is dependent on Pulldown B and Pulldown B is dependent on Pulldown A.

### Set up the Child Pulldown Menu to select a Parent Pulldown

To configure the child pulldown menu so that a particular pulldown is selected to be the parent pulldown,

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Edit** button to the left of the pulldown field that will act as the child pulldown menu
5. In the **Edit Pulldown Attributes** section, select the field that will act as the parent pulldown in the **Parent Pulldown** field (as shown in the figure below).
6. Click on the **OK** button to save this change.

### Special Cases

Please note that the fields Status, Assigned To, or Reported By cannot be involved in a dependent relationship. The only dependencies that can be created based on these fields is via the [Managing Workflows](#) section.

**Edit Global Pulldown Field: Component**

OK Cancel

Label

Record Order

Required for Add & Submit  Yes  No

Include in Submit Page  Yes  No

Copy Field value for Next Add  Yes  No

Display Next Field Inline  Yes  No

Display Style

Parent Pulldown

Help Description  (Displayed on Add, Edit and Task pages)

Add Page Visibility

Product

<No Pulldown>

Platform

Severity

Priority

Substatus

[Developers]

[Managers]

[QA]

[RestrictedUsers]

All

None

### Configure relationships between option menu values in the parent pulldown and the child pulldown

Tracker must be configured to show which option menu values in the child pulldown correspond to each option menu value in the parent pulldown. This configuration will determine which values should be displayed in the child pulldown when a particular value is selected in the parent pulldown field.

When specifying a parent pulldown field for the child pulldown field, Tracker will automatically create implicit relationships to relate the option menu items in the parent pulldown menu with the option menu items in the child pulldown menu. This is done to ensure that each parent option menu item is related to at least one option menu item from the child pulldown menu. The following example shows a temporary (implicit) relationship created automatically for a parent pulldown menu.

The item "Other \* " listed in the "Associated" column is an implicit relationship.

### Edit Menu Item Dependencies for Pulldown: Product

Option Menu Item Other ▼

Associated Option Menu Component ▼

---

Select item(s) from the 'Component' option menu to associate (unassociate) with 'Other' and click the Add (Remove) button.  
 You can use multiple selection to associate (unassociate) many items at once.

Associated Items		Unassociated Items
Other *	<input type="button" value="Remove »"/>  <input type="button" value="« Add"/>	Hard Drive Other Paper Tray Toner Video Card None

**Note:** No menu item in 'Component' is associated to the selected menu item in the parent menu 'Product'. Temporarily, the default menu item for 'Component' is associated to the selected menu item in the 'Product' and is displayed in the 'Associated Items' list (marked with \* at the end). You can explicitly create an association by selecting a menu item from the 'Unassociated Items' list and clicking 'Add' button. This will remove the temporary (implicit) association. For more information, please review the following section in the [Administrative Help Guide](#).

These temporary (implicit) relationship(s) are just a starting point after configuring a dependent relationship. In this section, you will have the opportunity to change the implicit relationships created by Tracker. Once you create an explicit relationship as mentioned in the steps below, the implicit relationship(s) will be removed.

There are 2 ways to configure the relationships between the option menu items in the parent and child pulldown fields:

- By mapping child option menu values to corresponding parent option menu values
- OR**
- By mapping parent option menu values to corresponding child option menu values

**To map the values with respect to the parent pulldown menu,**

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the parent pulldown menu
5. Click on the **Item Dependencies** button
6. The **Option Menu Item** field will contain the option menu items configured for the parent pulldown menu. Make a selection in this field so that you can configure option menu items from the child pulldown to be associated to this option menu item from the parent pulldown.
7. The **Associated Option Menu** field will contain all option menus that are associated with the parent pulldown. The option menu items of the pulldown that you select in this field will be displayed in the columns below to be associated or unassociated to the parent option menu item selected in the Option Menu Item field.
8. Any child option menu items already associated with the parent option menu item will be displayed in the left column called **Associated**. Any child option menu items in the Associated column proceeded by "\*" are implicit relationships (these relationships were made when the parent pulldown was selected for the child pulldown field in the Edit Attributes section of the Managing Fields page).

Any child option menu items not associated with the parent option menu item will be displayed in the right column called **Not Associated**. A child option menu item temporarily associated to the parent (proceeded by "\*\*") will also be listed in the Not Associated column without "\*\*".

To select a pulldown menu value to be associated to the parent pulldown menu value, click on the child option menu item in the **Not Associated** column, then click on the **Add** button. The child option menu item will be moved to the Associated column. To select multiple child option menu items, hold the **Shift** key on your keyboard while clicking on multiple values.

As soon as ANY child option menu item from the Not Associated column is added to the Associated column, any implicitly associated child option menu item (preceded by "\*\*\*") will be removed from the Associated column. When you choose to associate a child option menu item to a parent option menu item manually, you are creating an explicit relationship. Any explicit relationship removes the implicit (temporary) relationship created automatically by Tracker.

9. Select another parent option menu item in the **Option Menu Item** field, then choose the corresponding child option menu items to be associated.
10. After assigning child option menu items to each parent option menu item listed in the Option Menu Item field, click on the **OK** button to return to the Manage Menu Items section.

The following figure shows the result of associating option menu items from one pulldown to another. "Our Computer" is an option menu item of the "Product" field. The "Product" field is a parent to the "Component" field. The "Component" field has the option menu items "Other", "Video Card", and "Hard Drive", which have been associated to the "Our Computer" option menu item. "Component" also has the option menu items "Paper Tray" and "Toner", which are unassociated with the "Our Computer" option menu item.

### Edit Menu Item Dependencies for Pulldown: Product

Option Menu Item

Associated Option Menu

---

Select item(s) from the 'Component' option menu to associate (unassociate) with 'Our Computer' and click the Add (Remove) button.  
 You can use multiple selection to associate (unassociate) many items at once.

Associated Items		Unassociated Items
Hard Drive Video Card Other	<input type="button" value="Remove »"/>  <input type="button" value="« Add"/>	Paper Tray Toner

To map the values with respect to the child pulldown menu,

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the child pulldown menu
5. Click on the **Item Dependencies** button
6. The **Option Menu Item** field will contain the option menu items configured for the child pulldown. Make a selection in this field so that you can configure option menu items from the parent pulldown to be associated to this option menu item from the child pulldown.
7. The **Associated Option Menu** field will contain all option menus that are associated with the child pulldown. The option menu items of the pulldown that you select in this field will be displayed in the columns below to be associated or unassociated to the child option menu item selected in the Option Menu Item field.
8. Any parent option menu items already associated with the child option menu item will be displayed in the left column called **Associated**. Any parent option menu items in the Associated column preceded by "\*\*\*" are implicit relationships (these relationships were made when the parent pulldown was selected for the child pulldown field in the Edit Attributes section of the Managing Fields page).

Any parent option menu items not associated with the child option menu item will be displayed in the right column called **Not Associated**. A parent option menu item temporarily associated to the child (preceded by "\*\*\*") will also be listed in the Not Associated column without "\*\*\*".

To select a option menu value to be associated to the child option menu value, click on the parent option menu item, then click on the **Add** button. The parent option menu item will be moved to the Associated column. To select multiple parent option menu items, hold the **Shift** key on your keyboard while clicking on multiple values.

As soon as ANY parent option menu item from the Not Associated column is added to the Associated column, any implicitly associated parent option menu

- item (preceded by "\*\*") will be removed from the Associated column. When you choose to associate a parent option menu item to a child option menu item manually, you are creating an explicit relationship. Any explicit relationship removes the temporary (implicit) relationship created automatically by Tracker.
9. Select another child pulldown menu item in the **Option Menu Item** field, then choose the corresponding parent pulldown menu items to be associated.
  10. After assigning parent menu items to each child menu item listed in Option Menu Item field, click on the **OK** button to return to the Manage Menu Items section.

The following figure shows the result of associating option menu items from one pulldown to another. "Video Card" is an option menu item of the "Component" field. The "Component" field is a child of the "Product" field. The "Product" field has the option menu item "Our Computer", which has been associated to the "Video Card" option menu item. "Product" also has the option menu items "None" and "Our Printer", which are unassociated with the "Video Card" option menu item.

**Edit Menu Item Dependencies for Pulldown: Component**

Option Menu Item

Associated Option Menu

---

Select item(s) from the 'Product' option menu to associate (unassociate) with 'Video Card' and click the Add (Remove) button.  
 You can use multiple selection to associate (unassociate) many items at once.

Associated Items		Unassociated Items
Our Computer	<input type="button" value="Remove »"/>  <input type="button" value="« Add"/>	Our Printer Other

---

### Dependent Relationships with Multiple Levels of Hierarchy

Dependent relationships between pulldown menus can span multiple levels. For instance, Pulldown A can be the parent of Pulldown B. Pulldown B is the parent of Pulldown C. This is a 3 level dependent relationship. Multiple level hierarchies (with 3 or more levels) are displayed slightly differently than a relationship where there is only 2 levels (one parent and its child pulldown menus). For multiple level hierarchies, the complete tree structure of all of the pulldown menus involved is displayed in the Item Dependencies page for each pulldown. The figure below demonstrates a 3 level hierarchy with the following dependencies established:

#### Product > Component > Sub-Component

The **Product** field represents the root (or highest) level in the hierarchy. The figure below shows the relationships between the **Component** field and **Sub-component**, its child pulldown.

**Edit Menu Item Dependencies for Pulldown: Component**

OK

Option Menu Item

Associated Option Menu

---

Select item(s) from the 'Sub-Component' option menu to associate (unassociate) with 'Paper Tray' and click the Add (Remove) button.  
You can use multiple selection to associate (unassociate) many items at once.

Associated Items	Remove »	Unassociated Items
<pre>[-]Our Printer [-]Paper Tray     Sub-component 1</pre>	<input type="button" value="Remove »"/>  <input type="button" value="« Add"/>	<pre>[-]Our Printer [-]Paper Tray     None     Sub-component 2</pre>

---

OK

This figure displays which option menu items from "Sub-Component" are associated with "Paper Tray", an option menu item in the Component field. In the **Associated Items** column, the option menu item "Sub-component 1" is associated with "Paper Tray". The option menu item "Sub-component 2" is unassociated with "Paper Tray".

Note the items "[-] Our Printer" and "[-] Paper Tray" in the tree structure displayed in this figure. "[-] Our Printer" is an option menu item of the Product field (from the root or highest level of the hierarchy). "[-] Paper Tray" is an option menu item of Component field (the second level of the hierarchy). When multiple level hierarchies exist in Tracker, the Item Dependencies page for a pulldown menu will display the tree structure higher than its own level. So, in the example explained above, the figure shows the Item Dependencies page for the Component field and also shows the level above Component.

## Setting Defaults for Dependencies

Because dependencies can be mapped such that the option menu item that is the "global default" (the [default](#) for the field involved in the dependent relationship) is not a valid selection, you can specify defaults for each parent-child mapping. The defaults should only be selected after mapping the relationships between the menu items in the **Item Dependencies** page. Instructions on mapping pulldown menu items can be found in the [Configure relationships between option menu values in the parent pulldown and the child pulldown](#) section.

For example, let's say the Product is parent to Component with the following values

Product: Product A, Product B

Component: 10, 20, 30, 40

The option menu item "20" is the default for the Component field.

The following relationships are set up between Product and Component:

Product A > 10, 30, 40

Product B > 20, 30, 40

The option "20" is the "global default" for the Component field, but it is not a valid option when Product A is selected. You can specify which item ("10", "30" or "40") will be selected in the Component field by default when Product A is selected via the Default Items section.

To set the defaults for a parent-child mapping:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Fields** button
4. Click on the **Items** button
5. Click on the **Default Items** button

- A tree structure will be displayed. Each parent option menu item will be preceded by "[ ]". Under each parent option menu item, the related child option menu items will be displayed. If a parent option menu item does not appear on this page, this indicates that the parent item does not have any child items related (or mapped) to it.

Select one child option menu item to be the default value for each parent. To set the child option menu item as the default, click on the child option menu item, then click on the **Toggle Default** button. Once the child option menu item has been set as the default, "[Default]" will be noted after the name of the child option menu item.

- Click **OK** to return to the Manage Menu Items page.

When the child pulldown is set as required during the Add or Task operations (when a field is required on Add or Task, the user is prompted to choose an option menu item other than the global default in order to complete the Add or Task operation) and the global default for the field is not a valid value, the user will not be forced to make a different selection because the field is already set to a value that is different than the global default. You can control which default is available when the global default is not a valid value by setting the defaults for dependencies using the steps above.

---

## Effects of Making Changes to Dependent Pulldowns

Dependent relationships between pulldown fields can be established at any time and also can be removed at any time. Because these changes can be made before and / or after problem records have been added, there are situations where these changes in the dependent relationships could result in additional changes with respect to the option menu items of the pulldowns involved. During the course of changing the relationship between pulldown fields (either when editing a pulldown's parent or modifying the mapping in the Item Dependencies section), Tracker will prompt the user with information about the effects of changing dependent relationships. Examples of such changes are discussed below. The following **sample multiple level hierarchy** is provided to illustrate the examples below:

### Product > Component > Request Type > Priority

In addition, the **root** level is the highest level in the hierarchy (the Product field in this example). The **intermediate leaf** level are the levels in the middle of the hierarchy (the Component or Request Type fields). The **last leaf** level is the lowest level in the hierarchy (the Priority field in this example).

Click on the example to see an explanation of the effects

- [Pulldown Field at the root or last leaf level deleted](#)
- [Pulldown Field at an intermediate leaf level deleted](#)
- [Option Menu Item deleted from a pulldown menu involved at any level](#)
- [Parent Pulldown changed to <No Pulldown>](#)
- [The associations between an Option Menu Item and the next lower level are removed](#)
- [Parent Pulldown changed to another pulldown field](#)

### Explanations for the above cases

- Pulldown Field at the root or last leaf level deleted in the Managing Fields section**

When a pulldown field is deleted, any parent or child pulldown fields associated with the removed field will become independent of the relationship. The removed pulldown field will be removed from all records, but any levels of hierarchy above or below this field will be preserved.

Using the example, if **Product** were deleted, the Product field and all of its option menu items would be removed. The option menu items in the **Component** field would be independent of the associations that existed with the Product field. However, the dependent relationship between Component and **Request Type** would be preserved. The dependencies in the level below Request Type are also preserved.

Similarly, if **Priority** were deleted, the Priority field and all of its option menu items would be removed. The option menu items in the **Request Type** field would be independent of the associations that existed with the Priority field. However, the dependent relationship between Request Type and **Component** would be preserved. The dependencies in the level above Component would also be preserved.

- Pulldown Field at an intermediate leaf level deleted in the Managing Fields section**

When a pulldown field is deleted, any parent or child pulldown fields associated with the removed field will become independent of the relationship. The removed pulldown field will be removed from all records, but any levels of hierarchy above or below this field will be preserved.

Using the example above, if **Component** were deleted, the Component field and all of its option menu items would be removed. The option menu items in the **Product** and **Request Type** fields would be independent of the associations that existed with the Component field. However, the dependent relationship between Request Type and **Priority** would still be preserved.

- Option Menu Item deleted from a pulldown menu involved at any level**

When an option menu item is removed by deleting it in the **Items** section of a pulldown menu, the user making the change will be prompted with the options below:

- Choose one of the remaining menu values for that field to replace the removed value in records that have the obsolete value selected. If this option is chosen, there may be records where the parent and child values do not follow the dependent relationship configured in the Item Dependencies section. Using the example above, **Product** has the option menu items "Our Printer" and "Our Computer". "Our Printer" is associated with the option menu item "Paper Tray" from the "Component" field. "Our Computer" is associated with the option menu item "Hard Drive" from the "Component" field. If we choose to replace the value "Our Printer" in all records where "Our Computer" is selected, these records will have "Our

Printer" entered with "Hard Drive" in the "Component" field even though "Hard Drive" is unassociated with "Our Printer" in the Item Dependencies section. However, after completing this operation, you could use the [Edit Results](#) operation to globally change these records to have acceptable values. In the case described above, you could run a query with the criteria "Product" = "Our Printer" and "Component" = "Hard Drive". Then, when the results are generated, use the Edit Results operation to change the "Component" field to have a value that is associated with "Our Printer" for all of the records displayed in the query results.

- o Delete any records that contain the obsolete value. Choosing this option will permanently delete these records.
- o Leave the records containing the obsolete value unchanged. Choosing this option may cause unexpected results in the Edit, Task, Query and Metrics pages when the obsolete value is present in a record.

4. **Parent Pulldown changed to <No Pulldown> in the Managing Fields section**

When the **Parent Pulldown** attribute of a pulldown is changed to <No Pulldown> in the **Managing Fields** section, the option menu items of this pulldown become independent of any associations that existed between the pulldown and its former parent. However, any dependencies that exist at levels above or below this pulldown will be preserved.

Using the sample hierarchy above, let's say the **Component** field was changed to have <No Pulldown> in the Parent Pulldown attribute in the Managing Fields section. The option menu items of Component will be independent of the associations that existed with **Product**. However, the associations between the option menu items of Component and levels below it will be preserved.

Using the sample hierarchy, let's say the **Request Type** field was changed to have <No Pulldown> in the Parent Pulldown attribute in the Managing Fields section. The option menu items of Request Type will be independent of the associations that existed with **Component**. However, the associations between Request Type and **Priority** will be preserved. The associations between **Product** and Component will also be preserved.

5. **The associations between an Option Menu Item and the next lower level are removed in the Item Dependencies page**

If all of the associations between an option menu item and the next lower level are removed, this indicates that the option menu item is not explicitly associated with any option menu item in a child pulldown menu. When this occurs, Tracker automatically creates an implicit (temporary) relationship between the option menu item and the default option menu item of the child pulldown menu. This implicit relationship is shown in the figure below. The "\*" after the child option menu item in the **Associated Items** column indicates that the association is implicit.

**Edit Menu Item Dependencies for Pulldown: Product**

Option Menu Item

Associated Option Menu

---

Select item(s) from the 'Component' option menu to associate (unassociate) with 'Other' and click the Add (Remove) button.  
 You can use multiple selection to associate (unassociate) many items at once.

Associated Items		Unassociated Items
Other *	<input type="button" value="Remove »"/>	Hard Drive Other Paper Tray Toner Video Card None
	<input type="button" value="« Add"/>	

**Note:** No menu item in 'Component' is associated to the selected menu item in the parent menu 'Product'. Temporarily, the default menu item for 'Component' is associated to the selected menu item in the 'Product' and is displayed in the 'Associated Items' list (marked with \* at the end). You can explicitly create an association by selecting a menu item from the 'Unassociated Items' list and clicking 'Add' button. This will remove the temporary (implicit) association. For more information, please review the following section in the [Administrative Help Guide](#).

Using the sample hierarchy and the figure displayed above, the **Product** field has the option menu item "Our Computer". All associations between "Our Computer" and the option menu items of the **Component** field were removed. The default option menu item of Component is "Other". Thus, when all of the associations between "Our Computer" and the option menu items of Component were removed, Tracker automatically created an implicit relationship between "Our Computer" and "Other \*".

#### 6. **Parent Pulldown changed to another pulldown field in the Managing Fields section**

When the **Parent Pulldown** attribute of a pulldown is changed to select another pulldown menu in the **Managing Fields** section, the option menu items of this pulldown become independent of any associations that existed between the pulldown and its former parent. However, any dependencies that exist at levels above or below this pulldown will be preserved.

Using the sample hierarchy above, let's say the **Component** field was changed to have another field, **Severity**, in the Parent Pulldown attribute in the Managing Fields section. The option menu items of Component will be independent of the associations that existed with **Product**. However, the associations between the option menu items of Component and levels below it will be preserved.

Using the sample hierarchy, let's say the **Priority** field was changed to have another field, **Severity**, in the Parent Pulldown attribute in the Managing Fields section. The option menu items of Priority will be independent of the associations that existed with **Request Type**. However, the associations between Request Type and **Component** will be preserved. The associations between Component and **Product** will also be preserved. Tracker will automatically create an implicit association(s) between the default option menu item of Priority and the option menu items of its new parent, Severity. These temporary associations can be changed by creating explicit associations in the **Item Dependencies** section.


**NetResults Tracker**

Help Topics
<<
>>

## Overview

Tracker allows you to customize workflows to match your organization's procedure for processing records. A **workflow** process is a set of steps, represented by states and transitions. Each record will move through the workflow steps to be processed by various users who enter information into the record throughout the process. Any number of workflows and states may be defined. Each **state** may have one or more transitions. A **state group** is a collection of states that can be used in workflow settings, transitions and reports. A **transition** is a path from one state to another state.

A Default Workflow is created in each workgroup. The name of the default workflow depends on the template that was used to create the workgroup. For example, the Product Development template has the "Product Development Issue Process" created by default and the Help Desk template has the "Help Desk Ticket Process" created by default. Information about the default settings in a particular template can be found in the template list in the [Putting It All Together](#) section.

The following sections describe aspects of the Workflow Customization in detail:

[Managing Workflows](#)

[States](#)

[Transitions](#)

[Forms](#)

[Email Rules](#)

Before customizing your workflow, it may be helpful to review the [Tracking Defects with Tracker](#) section to get a feel for how the workflow settings interact with other areas in Tracker.

## Managing Workflows

Multiple workflows can be created and managed in the Manage Workflows section. By default, a single workflow called "Default Workflow" is configured in a workgroup.

### Workflows List

OK Add Workflow Global States

**Workflows:** Product Issue Process Delete Set as Default

- [-] **Product Issue Process** [ [Edit](#) | [Expand All](#) | [Collapse](#) ]
  - [-] **States** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]
    - [-] Reported
    - [-] Scheduled
    - [-] In Development
    - [-] Fixed
    - [-] In Test
    - [-] Tested
    - [-] Released
    - [-] Deferred
    - [-] Duplicate
    - [-] Closed
  - [-] **Forms** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]
    - [-] Issue
  - [-] **Outgoing Email Rules** [ [Manage](#) | [Edit Based On](#) | [Expand All](#) | [Collapse](#) ]
    - [-] On Add <Record>, notify <Assignee>, <Reporter>, <State Manager>
    - [-] On Delete <Record>, notify <Assignee>, <Reporter>, <State Manager>
    - [-] On Change of <Record> Assigned To, notify <Assignee (new)>, <State Manager>
    - [-] On Change of <Record> Status to Closed, notify <Reporter>
    - [-] On Change of <Record> Status to Deferred, notify <Reporter>

## Managing Workflows

On Change of <Record> Status to Deferred, notify <Reporter>  
On Change of <Record> Status to Duplicate, notify <Reporter>  
On Change of <Record> Status to Released, notify <Reporter>

Workflows: Product Issue Process Delete Set as Default

OK Add Workflow Global States

To **view** the properties of a workflow:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. By default the Default Workflow's properties will be displayed. To view another workflow's properties, select a workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.

The workflow properties include the [states](#) that are part of the workflow, the [transitions](#) available in each state, the [forms](#) which use the workflow and the [email rules](#) in effect for the workflow.

Click on the **Expand All** link to the right of the workflow name to expand all of the sub-sections of the workflow. Click on the **Collapse** button to collapse the expanded sub-sections. The sub-sections include:

- o [States](#)
- o [Next States for each state](#)
- o [Transitions for each state](#)
- o [Transition Properties, Task Fields](#) and [Alerts](#)
- o [Forms](#)
- o [Form Properties, Email Content](#) and [Alerts](#)
- o [Email Rules](#)

Please note: In the Manage Workflows section, a "+" icon is available for expanding sub-sections and a "-" icon is available for collapsing sub-sections.

## Adding a Workflow

To **add** a workflow:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Click on the **Add Workflow** button
5. Enter a name for the workflow in the **Workflow Name** field. Select the forms which can use this workflow in the **Make Available To Forms** field
6. Click **OK** to save the new workflow
7. Click **OK** to view and manage the properties of the newly added workflow or click [Set States](#) to add states to the newly added workflow

## Editing a Workflow Name

To **edit** the name of a workflow:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Edit** button to the right of the Workflows pulldown
6. Edit the name of the workflow in the **Workflow Name** field
7. Click **OK** to save the change
8. Click **OK** when the change is confirmed

## Deleting a Workflow

A workflow can only be deleted if it is not currently being used by any project.

To **delete** a workflow:

1. Login to the [workgroup](#) as Admin

2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Delete** button to the right of the Workflows pulldown
6. Click **OK** to confirm the operation
7. If there were no projects using the workflow you are deleting, a warning will be displayed to note that by deleting the workflow all of its Transitions, Form Settings (such as Default Add State Settings, Email Common Content, Alerts) and Outgoing Email Rules will be permanently removed. Click **OK** to proceed.
8. Click **OK** when the confirmation page is displayed

If any projects are currently using the workflow you are deleting, you will be prompted to either change the workflow being used by the project or remove the form using this workflow from the project.

To change the workflow being used by the project:

- a. Click on the **Admin** icon
- b. Click on the **Manage Projects** button
- c. In the **Projects** pulldown, select the project using the workflow you wish to delete
- d. In the **Forms** section, locate the form using the workflow you wish to delete
- e. Click on the **Change** link to the right of the **Workflow** field
- f. Select another workflow in the **Workflow** pulldown and click **OK** to save this change. Another workflow may not be available for selection depending on how your forms are configured. If another workflow is not available for selection, proceed to the steps below to remove the form from the project instead.
- g. Repeat the steps above starting with [To delete a workflow](#) to delete the workflow

To remove the form from the project:

- a. Click on the **Admin** icon
- b. Click on the **Manage Projects** button
- c. In the **Projects** pulldown, select the project using the workflow you wish to delete
- d. Click on the **Manage** link to the right of the **Forms** section
- e. Click on the form, then click on the **Remove** button
- f. Click **OK** to confirm the operation
- g. A warning will be displayed to note that by removing the form from the project all records for this project that were created using this form will be permanently removed (along with related information such as History, Attachments, Record Security, Source Code Files, Alerts, Discussion Threads, etc.) as well as the form's State Manager and Incoming Email settings. Click **OK** to proceed.
- h. Click **OK** when the confirmation is displayed
- i. Repeat the steps above starting with [To delete a workflow](#) to delete the workflow

## Setting a Default Workflow

You can select which workflow you would like to see by default when you go to the **Manage Workflows** page in the Admin section.

To set the **default workflow**:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow you wish to make the default in the **Workflows** pulldown at the top
5. Click on the **Set as Default** button to the right of the Workflows pulldown. If the Set as Default button is not available, this indicates that the workflow is already set as the default workflow.

---

## States

The states included in a workflow are managed in the **States** section.

**Manage States for Workflow: Default Workflow**

OK

States In Use		States Not In Use
1 Reported		15 Not Applicable
2 Scheduled		
3 In Development		
4 Fixed		
5 In Test		
6 Tested		
7 Released		
8 Deferred		
9 Duplicate		
10 Closed		

Transitions

Remove »

« Add

OK

#### To manage states:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Manage** link to the right of **States** for the workflow you wish to modify
6. The states in the **States In Use** column are states currently used by the selected workflow. The states in the **States Not In Use** column are states that are not currently used by the selected workflow. The states available for selection in the States Not In Use column are created in the [Workflow States](#) section.

To add a state to the workflow, click on a state in the States Not In Use column, then click on the **Add** button. To remove a state from the workflow, click on the state in the States In Use column, then click on the **Remove** button.

7. Click **OK** to return to the Manage Workflows section or click on a state and click on the **Transitions** button to manage the transitions for a state. Details about managing transitions can be found in the [Workflow Transitions](#) Help section.

## Transitions

Expanding a state listed in the States section for a workflow will display the state's Next States, Transitions, Transition properties, Task Fields and Alerts. Next States are states selected as the "New State" for a transition configured in the selected state. For example, if you have expanded the "Reported" state and it has a transition that will move records to the "Scheduled" state, The Scheduled state will be listed in "Next States" for the Reported state.

In the Transitions section of a state, there are links available for a detailed view of all of the transitions for a given state, editing a particular transition, managing task fields and editing Alerts settings from the Manage Workflows section.

**Workflows List**

OK Add Workflow Global States

Workflows: Product Issue Process Delete Set as Default

Product Issue Process [Edit | Expand All | Collapse]

States [Manage | Expand All | Collapse]

Reported

Next States : Closed , Deferred , Duplicate , Scheduled

Transitions [Manage]

Schedule [Edit]

New State : Scheduled

New Assignee : <State Manager>

Forms : Issue

Task Fields (2) [Manage]

Planned For Version (RelNum, Optional, Not Initialized, 28)

Priority (Pulldown, Optional, Not Initialized, 34)

Alert (Yes) [Edit]

Set Alert : Yes

Send Alert : 1 day(s) after <Task Date>

Repeat Alert : Every 1 day(s); Stop after 3 alert(s)

Send Alerts To : <Assignee>, <State Manager>

Show Alert settings during Task operation : No

Groups / Users that can edit Alert settings during Task operation : [Admins], [Developers], [Managers], [QA]

Other Properties

Defer [Edit]

Close [Edit]

Mark Duplicate [Edit]

Scheduled

In Development

Fixed

To see a **detailed view** of all of the transitions for a given state:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" to the left of a state to expand it.
6. Click on the **Manage** link to the right of **Transitions** to see a detailed view of the transitions configured for the state. Information for about this detailed view of the transitions can be found in the [Workflow Transitions Help section](#).

To **edit** a particular transition:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" to the left of a state to expand it
6. Click on the **Edit** button to the right of the transition you wish to modify Details for editing a transition can be found in the [Workflow Transitions](#) Help section.

To **manage the task fields** for a transition:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" to the left of a state to expand it

6. Click on the "+" to the left of a transition to expand it
7. Click on the **Manage** link to the right of **Task Fields** for the transition you wish to modify. Details for managing task fields can be found in the [Workflow Transitions](#) Help section.

To **edit the alerts settings** for a transition:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" to the left of a state to expand it
6. Click on the "+" to the left of a transition to expand it
7. Click on the **Edit** link to the right of **Alerts** for the transition you wish to modify. Details for editing alerts settings can be found in the [Alerts](#) Help section.

**Forms**

The forms in use by a workflow are managed in the Forms section.

**Workflows List**

**Workflows:** Product Issue Process

[-] **Product Issue Process** [ [Edit](#) | [Expand All](#) | [Collapse](#) ]

[-] **States** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Forms** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Issue**

[-] **Default Add State Settings** (based on **Product**) [ [Manage](#) | [Edit Based On](#) ]

[-] <Default> (Reported) [ [Edit](#) ]

[-] Default Add State : Reported

[-] Allowed Add States (State Group) : All

[-] None (Reported) [ [Edit](#) ]

[-] Product A (Reported) [ [Edit](#) ]

[-] Product B (Reported) [ [Edit](#) ]

[-] **Email Common Content** [ [Manage](#) | [Edit Based On](#) ]

[-] Greeting : Hello <recipient> ,

[-] Introduction :

[-] Signature : Regards, NetResults Tracker Software Product Development Workgroup

[-] **Alert** (based on **Priority**) [ [Manage](#) | [Edit Based On](#) ]

[-] <Default> (Yes) [ [Edit](#) ]

[-] None (Yes) [ [Edit](#) ]

[-] 1 (Yes) [ [Edit](#) ]

[-] 2 (Yes) [ [Edit](#) ]

[-] 3 (Yes) [ [Edit](#) ]

[-] 4 (No) [ [Edit](#) ]

[-] 5 (No) [ [Edit](#) ]

[-] **Outgoing Email Rules** [ [Manage](#) | [Edit Based On](#) | [Expand All](#) | [Collapse](#) ]

[-] On Add <Record>, notify <Assignee>, <Reporter>, <State Manager>

[-] On Delete <Record>, notify <Assignee>, <Reporter>, <State Manager>

[-] On Change of <Record> Assigned To, notify <Assignee (new)>, <State Manager>

[-] On Change of <Record> Status to Closed, notify <Reporter>

[-] On Change of <Record> Status to Deferred, notify <Reporter>

[-] On Change of <Record> Status to Duplicate, notify <Reporter>

[-] On Change of <Record> Status to Released, notify <Reporter>

**Workflows:** Product Issue Process

**To manage forms:**

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Manage** link to the right of **Forms**
6. Any forms currently in use by the selected workflow will be displayed in the **Forms In Use** column. Any forms available for selection will be displayed in the **Forms Not In Use** column. The forms that are listed in the Forms Not In Use column are created in the [Manage Forms](#) Help section.

To add a form to be used by the workflow, click on the form in the Forms Not In Use column, then click on the **Add** button. To remove a form from being used by the workflow, click on the form in the Forms In Use column, then click on the **Remove** button.

7. Click **OK** to return to the Manage Workflows section or click on a form in the Forms In Use column and click on the [Add State](#), [Email Content](#) or [Alert](#) buttons to modify the form's properties.

**Properties of Forms**

Expanding a form in the Forms section of a workflow will display the form's Default Add State Settings, Email Common Content and Alerts settings. You can configure Default Add State Settings, Email Content and Alerts for the form or configure each section based on each option menu item in a pulldown field.

**Default Add State Settings**

A form's Default Add State Settings determine what states are available and what state is selected by default in the Status field on the Add form. Default Add State Settings can be configured for a form or based on each option menu item in a particular pulldown.

**Workflows List**

Workflows: Product Issue Process

[-] **Product Issue Process** [ [Edit](#) | [Expand All](#) | [Collapse](#) ]

[-] **States** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Forms** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Issue**

[-] **Default Add State Settings** (based on **Product**) [ [Manage](#) | [Edit Based On](#) ]

[-] <Default> (Reported) [ [Edit](#) ]

[-] Default Add State : Reported

[-] Allowed Add States (State Group) : All

[-] None (Reported) [ [Edit](#) ]

[-] Default Add State : Reported

[-] Allowed Add States (State Group) : All

[-] Product A (Reported) [ [Edit](#) ]

[-] Default Add State : Reported

[-] Allowed Add States (State Group) : All

[-] Product B (Reported) [ [Edit](#) ]

[-] Default Add State : Reported

[-] Allowed Add States (State Group) : All

[-] **Email Common Content** [ [Manage](#) | [Edit Based On](#) ]

[-] **Alert** (based on **Priority**) [ [Manage](#) | [Edit Based On](#) ]

**To manage the Default Add State Settings for a form:**

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the **Manage** link to the right of **Default Add State Settings**

- The Default Add State settings for the form will be displayed.

If a **<Pulldown Name> <Default> Default Add State Settings** field is displayed (where <Pulldown Name> is the selected pulldown), this indicates that the default add state settings are set based on the option menu item selected in a particular pulldown field. If the <Pulldown Name> <Default> Default Add State Settings field is not displayed, this indicates that the Default Add State Settings are not different for each option menu item in a pulldown (the Default Add State Settings will be the same for all records added with this combination of Project and Form). The <Pulldown Name> <Default> Default Add State Settings field can be set using the [Edit Based On](#) link in the [Manage Workflows](#) section.

Select an option in the <Pulldown Name> <Default> Default Add State Settings field to set the Default Add State Settings that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the Default Add State Settings that correspond to that selection.

The <Pulldown Name> Values field contains the following options:

- **<Default>**  
Selecting this option will allow you to choose the Default Add State Settings that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Default Add State Settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- Option Menu Items for the **Based On** pulldown  
Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the Default Add State Settings that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Default Add State Settings configured for **<Default>** to be filled into the Default Add State Settings for the option menu item selected.

The **Allowed Add States** option allows you to select a state group to limit the states to which a newly record can be routed. When Based On is set to "None" and a record is added using the selected form, the Status field will only display the states that are included in the state group selected in the Allowed Add States option. When Based On is set to a pulldown field and a record is added using the selected form and the option menu item in the <Pulldown Name> values field, the Status field will only display the states that are included in the state group selected in the Allowed Add States option. [State Groups can be configured in the Workflow States](#) section.

The **Default Add State** option allows you to select to which state a newly added record will be routed by default. When Based On is set to "None" and a record is added using the selected form, the default selection in the Status field will be the state selected in the Default Add State option. When Based On is set to a pulldown field and a record is added using the selected form and the option menu item in the <Pulldown Name> values field, the default selection in the Status field will be the state selected in the Default Add State option.

- Click **OK** to save the selections

Another way to reach the configuration page for the **Default Add State Settings** for a form is:

- Login to the [workgroup](#) as Admin
- Click on the **Admin** icon
- Click on the **Manage Workflows** button
- Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
- Click on the **Manage** link to the right of **Forms**
- Click on a form in the **Forms In Use** column
- Click on the **Add State** button
- The Default Add State settings for the form will be displayed. The options available on this page are explained in the [section above](#).

To **edit the pulldown** that the Default Add State Settings are based on:

- Login to the [workgroup](#) as Admin
- Click on the **Admin** icon
- Click on the **Manage Workflows** button
- Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
- Click on the "+" icon to the left of the form you wish to modify
- Click on the **Edit Based On** link to the right of **Default Add State Settings**
- Select a pulldown in the **Based on Pulldown** so that you can configure different Default Add State Settings for each option menu item in this pulldown
- Click **OK** to save your selection
- Click **OK** to return to the Manage Workflows section or click **Set Default Add State Settings** to configure the settings for each option menu item in the selected pulldown

To **edit the default add state properties** for a specific pulldown option menu item:

- Login to the [workgroup](#) as Admin
- Click on the **Admin** icon
- Click on the **Manage Workflows** button
- Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.

5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the "+" icon to the left of **Default Add State Settings**
7. Click on the **Edit** link to the right of the pulldown option menu item
8. The Default Add State Settings for the selected option menu item will be displayed.

If you are editing the settings for the option menu item **<Default>**, the Default Add State Settings displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available when editing the settings for <Default>. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Default Add State Settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for an option menu item in the pulldown, the Default Add State Settings displayed will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Default Add State Settings configured for **<Default>** to be filled into the Default Add State Settings for the option menu item selected.

The **Allowed Add States** option allows you to select a state group to limit the states to which a newly record with the selected option menu item can be routed. The Status field will only display the states that are included in the state group selected in the Allowed Add States option. [State Groups can be configured in the Workflow States](#) section.

The **Default Add State** option allows you to select to which state a newly added record with the selected option menu item will be routed by default. The default selection in the Status field will be the state selected in the Default Add State option.

9. Click **OK** to save the selections
10. Click **OK** to return to the Manage Workflows section

## Email Common Content

Email Common Content are the parts of the email message that will be included in outgoing email notifications sent for records added using the selected form. A Greeting, Introduction and Signature are available in the Email Common Content for each form.

**Edit Email Common Content for Form: Record Form (in Workflow: Default Workflow)**

OK Cancel

Email Greeting

Email Introduction 

This message was sent from the Tracker <workgroup>.

Email Signature 

Regards,  
Tracker Administrator

OK Cancel

To manage the Email Common Content for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the **Manage** link to the right of **Email Common Content**
7. The Email Common Content settings for the form will be displayed.

If the **<Pulldown Name> <Default> Email Common Content** field is displayed (where <Pulldown Name> is the selected pulldown), this indicates that the email common content can be set differently for each option menu item in a particular pulldown field. If the <Pulldown Name> <Default> Email Common Content field is not displayed, this indicates that the Email Common Content settings are not different for each option menu item in a pulldown (the Email Common Content Settings will be the same for all records added with this combination of Project and Form). The <Pulldown Name> <Default> Email Common Content field can be set using the [Edit Based On](#) link in the [Manage Workflows](#) section.

Select an option in the <Pulldown Name> <Default> Email Common Content field to set the Email Common Content that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the Email Common Content

that correspond to that selection.

The <Pulldown Name> Values field contains the following options:

- **<Default>**  
Selecting this option will allow you to choose the Email Common Content that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Email Common Content that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- Option Menu Items for the **Based On** pulldown  
Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the Email Common Content that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Email Common Content configured for **<Default>** to be filled into the Email Common Content for the option menu item selected.

[Variables](#) can be used when customizing the Email Common Content. The **Email Greeting** is the first line of the body of email notification message, e.g. "Hello Sue Smith,".

The **Email Introduction** is a few lines in the body of the email notification message to introduce the email, e.g. a sentence or two to let the user know this is an automated response from Tracker.

The **Email Signature** is the last section of the body of the email notification message, typically used for the signature at the bottom of the email, e.g. contact information.

8. Click **OK** to save the selections

Another way to reach the configuration page for the **Email Common Content** of a form is:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Manage** link to the right of **Forms**
6. Click on a form in the **Forms In Use** column
7. Click on the **Email Content** button
8. The Email Common Content settings for the form will be displayed. The options available are described in the [section above](#).

To **edit the pulldown** that the Email Common Content is based on:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the **Edit Based On** link to the right of **Email Common Content**
7. Select a pulldown in the **Based on Pulldown** so that you can configure different Email Common Content for each option menu item in this pulldown
8. Click **OK** to save your selection
9. Click **OK** to return to the Manage Workflows section or click **Set Email Common Content Settings** to configure the settings for each option menu item in the selected pulldown

To **edit the email common content** for a specific pulldown option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the "+" icon to the left of **Email Common Content**
7. Click on the **Edit** link to the right of the pulldown option menu item
8. The Email Common Content settings for the selected option menu item will be displayed

If you are editing the settings for the option menu item **<Default>**, the Email Common Content settings displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Email Common Content that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for for an option menu item in the pulldown, the Email Common Content settings displayed will be applied when records are

added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Email Common Content configured for **<Default>** to be filled into the Email Common Content for the option menu item selected.

[Variables](#) can be used when customizing the Email Common Content. The **Email Greeting** is the first line of the body of email notification message, e.g. "Hello Sue Smith,".

The **Email Introduction** is a few lines in the body of the email notification message to introduce the email, e.g. a sentence or two to let the user know this is an automated response from Tracker.

The **Email Signature** is the last section of the body of the email notification message, typically used for the signature at the bottom of the email, e.g. contact information.

9. Click **OK** to save the selections
10. Click **OK** to return to the Manage Workflows section

## Alerts

Alert settings for a form determine when alert email notifications will be triggered when records are added to Tracker. The alert settings can also be set based on the option menu item selected in a particular field when a record is added (e.g. Product, Priority, Severity or any pulldown field you customize). The alert settings configured for a form can be applied automatically as records are added to the system or you can allow the end users to view and make changes to the alert settings when adding a record.

**Workflows List**

**Workflows:** Product Issue Process

[-] **Product Issue Process** [ [Edit](#) | [Expand All](#) | [Collapse](#) ]

[-] **States** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Forms** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

[-] **Issue**

[-] **Default Add State Settings** (based on **Product**) [ [Manage](#) | [Edit Based On](#) ]

[-] **Email Common Content** [ [Manage](#) | [Edit Based On](#) ]

[-] **Alert** (based on **Priority**) [ [Manage](#) | [Edit Based On](#) ]

[-] <Default> (Yes) [ [Edit](#) ]

[-] None (Yes) [ [Edit](#) ]

[-] 1 (Yes) [ [Edit](#) ]

Set Alert : Yes

Send Alert : 1 day(s) after <Now>

Repeat Alert : Every 1 day(s); Stop after 3 alert(s)

Send Alerts To : <Assignee>

Show Alert settings during Add operation : No

Groups / Users that can edit Alert settings during Add operation : [Admins], [Developers], [Managers], [QA]

[-] 2 (Yes) [ [Edit](#) ]

Set Alert : Yes

Send Alert : 1 day(s) after <Now>

Repeat Alert : Every 1 day(s); Stop after 3 alert(s)

Send Alerts To : <Assignee>

Show Alert settings during Add operation : No

Groups / Users that can edit Alert settings during Add operation : [Admins], [Developers], [Managers], [QA]

[-] 3 (Yes) [ [Edit](#) ]

[-] 4 (No) [ [Edit](#) ]

[-] 5 (No) [ [Edit](#) ]

To manage the alert settings for a form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.

5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the **Manage** link to the right of **Alerts**.
7. The Alert settings for the form will be displayed.

If a **<Pulldown Name> <Default> Alert Settings** field is displayed (where <Pulldown Name> is the selected pulldown), this indicates that the Alert settings can be set differently for each option menu item in the selected pulldown. If the <Pulldown Name> <Default> Alert Settings field is not displayed, this indicates that the Alert settings are not different for each option menu item in a pulldown (the Alert settings will be the same for all records added with this combination of Project and Form). The <Pulldown Name> <Default> Alert Settings field can be set using the [Edit Based On](#) link in the [Manage Workflows](#) section.

Select an option in the <Pulldown Name> <Default> Alert Settings field to set the Alert settings that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the Alert settings that correspond to that selection.

The <Pulldown Name> Values field contains the following options:

- **<Default>**  
Selecting this option will allow you to choose the Alert settings that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Alert settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- Option Menu Items for the **Based On** pulldown  
Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the Alert settings that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Alert settings configured for **<Default>** to be filled into the Alert settings for the option menu item selected.

#### Set Alert

Selecting Yes indicates an alert should be generated for a newly added record using the selected form and if applicable, the selected pulldown value.

#### Send Alert

The period of time that should pass before the alert is sent. You can enter a number from 1 - 99, select the interval (hour, day, week, or month), select "before" or "after" as the point of reference for the alert, and a starting point for the time period. The starting point can be "<Now>", or can be based on any of the date fields in the record.

**Example 1:** By entering "1 day after <Now>", the alert will be sent 1 day after the record is added.

**Example 2:** By entering "1 day before <Date Field>", the alert will be sent 1 day before the date entered in the date field selected.

If a date field is selected as the date to generate an alert and this date field has no value in a record, an alert will not be generated. If a date field is selected as the date to generate an alert and this date field is later removed from the record (deleted in the [Manage Fields](#) section, then <Now> will be set as the date to generate an alert (to replace the date field that was removed).

#### Repeat options

Check the box to allow the alert to be sent multiple times after the initial time period (in Send Alert field above) has passed. Select the repeat period by entering a number from 1 - 99 and the interval (hour, day, week, month). Then, select how many times the alert should be repeated. Select either **Stop after X alerts** where X is a number from 1 - 10 or **Repeat forever**. Repeat forever will continue to repeat the alert periodically until the state of the record is changed.

#### Send Alerts To

Click on the groups and / or users who should receive the alert messages. To select multiple users and / or groups, hold down the **Ctrl** button on your keyboard while clicking on each user and group you would like to select.

#### Show Alert settings during the Add operation

Selecting Yes indicates that the user should be prompted to select alert settings on the Add page when creating a new record.

#### Groups / Users that can edit alert settings during the Add operation

Click on the groups and / or users that should be allowed to edit the alert settings on the Add page when creating a new record. To select multiple users and / or groups, hold down the **Ctrl** button on your keyboard while clicking on each user and group you would like to select.

8. Click **OK** to save the selections

Another way to reach the configuration page for **Alert** settings for a form is:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Manage** link to the right of **Forms**
6. Click on a form in the **Forms In Use** column
7. Click on the **Alert** button
8. The Alert settings for the form will be displayed. The options available are described in the [section above](#).

To **edit the pulldown** that the Alert settings are based on:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the **Edit Based On** link to the right of **Alert**
7. Select a pulldown in the **Based on Pulldown** so that you can configure different Alert settings for each option menu item in this pulldown. The fields Status, Assigned To and Reported By are not available for selection. Alerts based on Status can be achieved by [configuring Alerts for transitions](#).
8. Click **OK** to save your selection
9. Click **OK** to return to the Manage Workflows section or click **Set Default Alert Settings** to configure the settings for each option menu item in the selected pulldown

To **edit the alerts settings** for a specific pulldown option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the "+" icon to the left of the form you wish to modify
6. Click on the "+" icon to the left of **Alerts**
7. Click on the **Edit** link to the right of the pulldown option menu item
8. The current Alert settings for the selected option menu item will be displayed.

If you are editing the settings for the option menu item **<Default>**, the Alert settings displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Alert settings that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for an option menu item in the pulldown, the Alert settings displayed will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Alert settings configured for **<Default>** to be filled into the Alert settings for the option menu item selected.

#### **Set Alert**

Selecting Yes indicates an alert should be generated for a newly added record with the selected option menu item.

#### **Send Alert**

The period of time that should pass before the alert is sent. You can enter a number from 1 - 99, select the interval (hour, day, week, or month), select "before" or "after" as the point of reference for the alert, and a starting point for the time period. The starting point can be "<Now>", or can be based on any of the date fields in the record.

**Example 1:** By entering "1 day after <Now>", the alert will be sent 1 day after the record is added.

**Example 2:** By entering "1 day before <Date Field>", the alert will be sent 1 day before the date entered in the date field selected.

If a date field is selected as the date to generate an alert and this date field has no value in a record, an alert will not be generated. If a date field is selected as the date to generate an alert and this date field is later removed from the record (deleted in the [Manage Fields](#) section, then <Now> will be set as the date to generate an alert (to replace the date field that was removed).

#### **Repeat options**

Check the box to allow the alert to be sent multiple times after the initial time period (in Send Alert field above) has passed. Select the repeat period by entering a number from 1 - 99 and the interval (hour, day, week, month). Then, select how many times the alert should be repeated. Select either **Stop after X alerts** where X is a number from 1 - 10 or **Repeat forever**. Repeat forever will continue to repeat the alert periodically until the state of the record is changed.

#### **Send Alerts To**

Click on the groups and / or users who should receive the alert messages. To select multiple users and / or groups, hold down the **Ctrl** button on your keyboard while clicking on each user and group you would like to select.

#### **Show Alert settings during the Add operation**

Selecting Yes indicates that the user should be prompted to select alert settings on the Add page when creating a new record.

#### **Groups / Users that can edit alert settings during the Add operation**

Click on the groups and / or users that should be allowed to edit the alert settings on the Add page when creating a new record. To select multiple users and / or groups, hold down the **Ctrl** button on your keyboard while clicking on each user and group you would like to select.

9. Click **OK** to save the selections
10. Click **OK** to return to the Manage Workflows section

## **Viewing and Editing Alert Settings during the Add Operation**

In order for the user to **view** the alert settings when adding a new record, the [alert settings for the form](#) used to submit the record must have **Show Alert Settings**

during **Add Operation** set to "Yes" and the user must be a member of a group with the [View Alerts Settings](#) user group privilege. On the Add page, the user meeting the criteria mentioned above will see the **Set Alert** field with a check box. Checking the box will allow the user to view the alert settings. When the user clicks **OK** to add a new record, the alert settings will be displayed, but cannot be modified. The **Additional Information** field can be modified to add a note or other information to be included in the alert notification message. Click **OK** to save the information entered.

For a user to **edit** the alert settings when adding a new record, the [alert settings for the form](#) used to submit the record must have **Show Alert Settings during Add Operation** set to "Yes" and the user (or a group of which the user is a member) must be specified in **Groups / Users that can edit Alert Settings during the Add operation**. On the Add page, the user meeting the criteria mentioned above will see the **Set Alert** field with a check box. Checking the box will allow the user to edit the alert settings. When the user clicks **Add** or **Add & Copy** to add a new record, the alert settings will be displayed. The user can modify the following settings with respect to alerts. By default, the values displayed here will be the values selected in the [alert settings for the form](#) used to submit the record.

The screenshot shows a web browser window titled "Product Development Tracker (pteval) - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a status message: "Record REC1 has been added". Below this, the "Alert Settings For Record REC1" dialog box is open. The dialog box has a title bar and three buttons: "OK", "Cancel", and "Reset".

The dialog box contains the following sections:

- Send Alert:** A radio button is selected for "1 day(s) after Date Reported". There is also an option "If Status is unchanged as of" with a calendar icon.
- Repeat Options:** A checked checkbox "Repeat every 1 day(s)" is present. There are also options for "Stop after 3 alert(s)" (selected) and "Repeat forever".
- Send Alerts To:** A list box containing the following items: "<Assignee>", "<Reporter>", "<State Manager>", "[Developers]", and "[Users]".
- Additional Information:** A text input field for entering notes.

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Reset".

## Basic Information About Email Notifications

The body of a Tracker email notification is divided into seven sections which you can configure. Listed from the top (first line of email body) to the bottom, they are as follows.

1. **Greeting** - the first line of the email, e.g. "Hello Sue Smith,.". The Greeting is configured in the [Email Common Content](#) settings for a form. Whether it is included in the notification message is determined by the "Greeting" [Email Content](#) user group privilege.
2. **Introduction** - a few lines to introduce the email, e.g. a sentence or two to let the user know this is an automated response from Tracker. The Introduction is configured in the [Email Common Content](#) settings for each form. Whether it is included in the notification message is determined by the "Introduction" [Email Content](#) user group privilege.
3. **Operation Description** - a few lines to describe why this email notification is being sent, e.g. this issue has been assigned to you (the recipient of the email). The Operation Description is configured within each [Email Rule](#) for a workflow. Whether it is included in the notification message is determined by the "Operation Description" [Email Content](#) user group privilege.
4. **Link** - link (URL) to the record in Tracker (record is displayed after you enter your login information). Whether this is included in the notification message is determined by the "Link" [Email Content](#) user group privilege.
5. **History Comment** - the History Comment that was entered by the user who triggered the email, e.g. comment they entered when using the Edit operation to update a record. Whether this is included in the notification message is determined by the "History Comment" [Email Content](#) user group privilege.
6. **Fields** - the fields of the record this email notification references. Which fields are included can be limited by User Group in the [Field Visibility](#) settings for each

field. Whether any fields are included in the notification message is determined by the "Fields" [Email Content](#) user group privilege.

7. **Signature** - the last section of the email, typically used for the signature at the bottom of the email (contact information). The Signature is configured in the [Email Common Content](#) settings for each form. Whether it is included in the notification message is determined by the "Signature" [Email Content](#) user group privilege.

The Greeting, Introduction, and Signature can be configured per [form](#). The Subject line of the email as well as the Operation Description part of the email body can be configured per [email rule](#) in a workflow. Each workflow can have its own unique set of conditions (defined by the email notification rules) which trigger email notifications. User Group membership (privileges) of the recipient can be used to determine which parts of the email are sent. And, each recipient's personal preferences are used to customize the content of the email they receive. For example, Date/Time fields will be formatted according to the recipient's time zone and date and time format preferences.

## Email Rules

Outgoing email notifications can be configured for a workflow using Email Rules. You can configure a set of email rules that are applied to a workflow or you can configure a set of email rules for each option menu item in a pulldown. Review the [Basic Information About Email Notifications](#) section for details about the structure of email notification messages.

**Workflows List**

**Workflows:** Product Issue Process ▼

**Product Issue Process** [ [Edit](#) | [Expand All](#) | [Collapse](#) ]

**States** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

**Forms** [ [Manage](#) | [Expand All](#) | [Collapse](#) ]

**Issue**

**Default Add State Settings** (based on **Product**) [ [Manage](#) | [Edit Based On](#) ]

**Email Common Content** [ [Manage](#) | [Edit Based On](#) ]

Greeting : Hello <recipient>,

Introduction :

Signature : Regards, NetResults Tracker Software Product Development Workgroup

**Alert** (based on **Priority**) [ [Manage](#) | [Edit Based On](#) ]

**Outgoing Email Rules** [ [Manage](#) | [Edit Based On](#) | [Expand All](#) | [Collapse](#) ]

On Add **<Record>**, notify <Assignee>, <Reporter>, <State Manager>

Subject : Record <number> Added

Operation Description : The following record has been added.

On Delete **<Record>**, notify <Assignee>, <Reporter>, <State Manager>

Subject : Record <number> Deleted

Operation Description : The following record has been deleted.

On Change of **<Record>** Assigned To, notify <Assignee (new)>, <State Manager>

Subject : Record <number> Assigned to <new assignee>

Operation Description : The following record has been assigned to <new assignee>.

On Change of **<Record>** Status to Closed, notify <Reporter>

On Change of **<Record>** Status to Deferred, notify <Reporter>

On Change of **<Record>** Status to Duplicate, notify <Reporter>

On Change of **<Record>** Status to Released, notify <Reporter>

**Workflows:** Product Issue Process ▼

To **manage email rules** for a workflow:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.

5. Click on the **Manage** link to the right of **Email Rules**
6. The Email Rules for the form will be displayed.

If the **<Pulldown Name> <Default> Email Rules** field is displayed (where <Pulldown Name> is the selected pulldown), this indicates that the Email Rules can be set differently based on the option menu item that was selected in the pulldown. If <Pulldown Name> <Default> Email Rules field is not displayed, this indicates that the Email Rules are not different for each option menu item in a pulldown (the Email Rules will be the same for all records added with this combination of Project and Form). The pulldown selected in the <Pulldown Name> <Default> Email Rules field can be set using the [Edit Based On](#) link in the [Manage Workflows](#) section.

Select an option in the <Pulldown Name> <Default> Email Rules field to set the Email Rules that will be applied when records are added to Tracker with this option menu item selected. When selecting an option in this field, the page will be refreshed to display the Email Rules that correspond to that selection.

The <Pulldown Name> Values field contains the following options:

- **<Default>**  
 Selecting this option will allow you to choose the Email Rules that will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). When this option is selected, the option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Email Rules that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.
- **Option Menu Items for the Based On pulldown**  
 Each [option menu item](#) configured for the pulldown field selected in the Based On field will be listed. Selecting an option menu item will allow you to set the Email Rules that will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Email Rules configured for **<Default>** to be filled into the Email Rules for the option menu item selected.

Decide whether you would like to [add](#), [edit](#) or [delete](#) an email rule.

7. Click **OK** to save the changes

### Set Outgoing Email Rules for Workflow: Default Workflow

Condition	Add	<Record>	
Notification List	<div style="border: 1px solid gray; padding: 5px;"> <div style="background-color: #e0e0e0; padding: 2px;">&lt;Assignee&gt;</div> <div style="padding: 2px;">&lt;Reporter&gt;</div> <div style="background-color: #e0e0e0; padding: 2px;">&lt;State Manager&gt;</div> <div style="padding: 2px;">[Admins]</div> <div style="padding: 2px;">[Developers]</div> <div style="padding: 2px;">[Managers]</div> </div>		
<b>Notification Rule</b>	Subject	Record <number> Added	
Operation Description	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;">                     The following record has been added.                 </div>		
<input type="button" value="Update Notification"/>		<input type="button" value="Reset"/>	

**Notification Rule List**

```

                On Add <Record>, notify <Assignee>,<State Manager>,[Admins]
                On Delete <Record>, notify <Assignee>,<State Manager>,[Admins]
                On Change of <Record> Assigned To, notify <Assignee (new)>,<Assignee (previous)>,<State Manager>,[Admins]
                On Change of <Record> Status to Scheduled, notify <Assignee>,<State Manager (new)>,<State Manager (previous)>
            
```

Edit Notification

Delete Notification(s)

OK

Cancel

To **add** an email rule:

1. Select a **Condition** (details of each option that can be selected are described in the [Options](#) section). Check the **Notification Rule List** to see if the condition you selected is already on the list. If so, you may wish to [edit](#) an existing preference rather than create a new one.
2. In the **Notification List**, select the user(s) and / or user group(s) that should receive an email message when the condition occurs. Descriptions of the special user roles such as Assignee, Reporter, etc. can be found in the [Notification List](#) section.
3. Enter information into the **Subject** field. This text will appear as the Subject line of the email message generated when the condition occurs. Up to 80 characters can be entered as the Subject.
4. Enter information into the **Operation Description** field. This text will appear in the body of the email message after the **Greeting and Introduction**. Up to 255 characters can be entered as the Operation Description (end of line characters do count towards that limit).
5. For the Subject and Operation Description, you can specify variables so that information from the issue that triggered the email notification is included. For an explanation and example of the variables that can be used, review the [Variables](#) section.
6. Click on the **Add Notification** button. The email rule will now be displayed in the **Notification Rule List**. Except when the Notification Rule is selected, it will be displayed with a green background until you click the **OK** button. This is to let you know that this rule has been added, but has not yet been saved. You can continue to create or modify rules, or you can click the **OK** button to save your changes.

To **edit** an email rule:

1. In the **Notification Rule List**, click on the Notification Rule you wish to modify, then click on the **Edit Notification** button (you can also simply double click on the Notification Rule).
2. The fields in the **Notification Rule** section will be updated with the information associated with the Notification Rule you selected.
3. Make changes to the fields in the **Notification Rule** section.
4. Click on the **Update Notification** button. The Notification Rule will be displayed with an orange background color until you click the **OK** button. This is to let you know that this rule has been edited, but the changes have not yet been saved. You can continue to edit more rules, or you can click the **OK** button to save your changes.

To **delete** an email rule:

1. In the **Notification Rule List**, click on the preference you wish to delete, then click on the **Delete Notification** button
2. Click on the **OK** button to save this change.

## Options Available When Configuring Email Rules

The following options are available when configuring email rules.

### Conditions

The Conditions below are the actions that can trigger an email rule to be sent. For all conditions you can select whether the condition applies to records added using a particular form configured for the workflow to which the email rules pertain (by selecting a specific form in the 2nd pulldown in the Condition selection) or to all records added using the workflow to which the email rules pertain (by selecting <Record> in the 2nd pulldown in the Condition selection). The forms available for selection in the 2nd pulldown in the Condition selection are based on the forms that have been [associated with this workflow](#).

- **Add**  
Setting a rule with this condition will send an email notification message when a record is added to the workgroup: using the [Add](#) page, using the [Submit](#) page, using the [Clone](#) operation on the View page, by [submitting via email](#), or by executing the Tracker SDK AddRecord operation.
- **Edit**  
Setting a rule with this condition will send an email notification message when a record is edited using the [Edit](#) operation.
- **Delete**  
Selecting this condition will send an email notification message when a record is deleted using the [Delete](#) operation.
- **Task**  
Selecting this condition will send an email notification message when the [Task](#) operation is performed on a record.
- **Change of**  
There are 2 parts to the **Change of** condition:
  - **Change of Status to <State or State Group>**  
Creating a rule with this condition will send an email notification message when a record's status is changed to the **State** selected. If a [State Group](#) is selected, an email notification message will be sent when a record's status is changed to one of the states in the State Group selected. To select this condition, select **Change of** in the first pulldown, select **Status** in the second pulldown, then select the **State** or **State Group** that should be used for this rule.

- **Change of Assignment**

Creating a rule with this condition will send an email notification message when a record's Assignment (Assigned To field) is changed. To select this condition, select **Change of** in the first pulldown, then select **Assigned To** in the second pulldown.

## Variables that can be used in the Email Content

There are a list of variables that are supported so that you can reference the specific record number, status, assignees when entering the content for email notifications. For example, if you want the Subject line for a rule to say "PRN 31 previously assigned to Development Manager has been re-assigned to Developer One", but since each record has an individual record number and may have various possible users that can be assigned at any point in the process, it is necessary to enter the content using variables. To set the Subject line such that it will enter the relevant PRN and User IDs for each record, enter the following into the Subject field exactly as it appears below:

**PRN <number> previously assigned to <old assignee> has been re-assigned to <new assignee>**

The variables supported by Tracker are listed below

To specify this information in the email content	Enter this variable into the field
record number - PRN	<number>
form + record number	<formnumber>
form name	<form>
workgroup name	<workgroup>
current user selected in the Assignee field	<assignee>
previous user selected in the Assignee field	<old assignee>
new user selected in the Assignee field	<new assignee>
current state selected in the Status field	<status>
previous state selected in the Status field	<old status>
new value selected in the Status field	<new status>
the user selected in the Reporter field	<reporter>
the user receiving the email notification message	<recipient>
the user whose action triggered the email	<action user>

In addition to the variables listed above, you can also include the value of any field in the record (except for TextArea and Date fields) by specifying the Field Name (in all lower case characters) and surrounding the name with < and >. For example, <text1>, <pulldown23>, or <product>. To find the Field Name for a particular field, click on the Admin icon, click on the [Manage Fields](#) button and note the name in parentheses (to the right of the Field Label). You can also select the field and click the Edit button between the two panes to view the field properties. The Field Name is the left-most property in the Field Attributes section. Note: **The field name variable must be specified in all lower case characters** (e.g. <text1> not <Text1>) to be properly recognized by the Tracker email processor.

## Notification List

The options below are available for selecting which users receive email notification messages for a particular rule.

### <Assignee>

The user currently assigned to the record

### <Assignee (new)>

The user assigned to the record after a change in the record's Assigned To field has been made. This user is only available for selection in rules for the condition "Change of <Record> Assigned To".

### <Assignee (previous)>

The user who was assigned to the record prior to a change made in the record's Assigned To field. This user is only available for selection in rules for the condition "Change of <Record> Assigned To".

### <Reporter>

The user who created the record using the Add, Submit Page or Submit via Email feature. When the Reported By field of a record is the "Inet" (Unregistered User), email notification messages are not sent to the Reporter.

### <State Manager>

The user who is listed as the manager of the record's current state according to the State Manager settings for the combination of Form and Project set in the record (refer to [Managing Projects](#) for more information).

**<State Manager (new)>**

The user who is listed as the manager of the record's current state according to the State Manager settings for the combination of Form and Project set in the record (refer to [Managing Projects](#) for more information) after a change in the record's Status field has been made. This user is only available for selection in rules for the condition "Change of <Record> Status".

**<State Manager (previous)>**

The user who is listed as the manager of the record's previous state according to the State Manager settings for the combination of Form and Project set in the record (refer to [Managing Projects](#) for more information) prior to a change in the record's Status field. This user is only available for selection in rules for the condition "Change of <Record> Status".

**<Unregistered User>**

This will send email notification messages to the email address saved in the [Unregistered User Email](#) field of a record. The rules that will be used to send email notifications to unregistered users depend on the setting for the [Send Email Notifications On](#) option in the [Unregistered User Options](#) section of the General Preferences page.

**User Groups**

All user groups in this workgroup will be displayed to be selected for the Notification List

To **edit the pulldown** that the Email Rules are based on:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Edit Based On** link to the right of **Email Rules**
6. Select a pulldown in the **Based on Pulldown** so that you can configure different Email Rule settings for each option menu item in this pulldown
7. Click **OK** to save your selection
8. Click **OK** to return to the Manage Workflows section or click **Set Email Rules** to configure the settings for each option menu item in the selected pulldown

To **edit the email rules** for a specific pulldown option menu item:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Select the workflow in the **Workflows** pulldown at the top of the page. The page will be refreshed to display the properties of the selected workflow.
5. Click on the **Edit** icon to the right of the option menu item
6. The Email Rules for the form will be displayed.

If you are editing the settings for the option menu item **<Default>**, the Email Rules displayed will be applied when new [option menu items are added](#) to this pulldown (the pulldown selected in the Based On field). The option **Apply these settings to other <Pulldown Name> values** will be available. Checking the box for the option Apply these settings to other <Pulldown Name> values will show a list of the option menu items for the Based On pulldown. Select the option menu item(s) that should inherit the same Email Rules that you have set for <Default>. To select multiple option menu items, hold down the **Ctrl** button on your keyboard while clicking on the desired option menu items.

If you are editing the settings for an option menu item in the pulldown, the Email Rules displayed will be applied when records are added to Tracker with this option menu item selected. Click on the **Load Defaults** button if you wish to have the Email Rules configured for **<Default>** to be filled into the Email Rules for the option menu item selected.

Decide whether you would like to [add](#), [edit](#) or [delete](#) an email rule.

7. Click **OK** to save the changes

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**Automatic Assignment for the Add and Task Operations**

The Status and Assignee of a record can be determined automatically when records are created using the Add form or processed using the Task operation. Automatic assignment functions for the Add and Task operations are based on:

- The combination of Form and Project selected for the record
- Whether the Status, and, Assigned To fields are visible on the Add page
- the selection made in particular pulldown fields for the record such as Product, Priority, Severity or other pulldown fields you customize (optional)

**Automatic Assignment Guidelines for Add Page**

When a field is visible on the Add page, this indicates that the field's visibility settings are configured such that the field is displayed on the Add page when a user creates a new record. Please review the [Field Visibility](#) section of the [Managing Fields](#) Help section for more information.

Tracker's automatic assignment for a new record is a combination of the values selected for Form, Project, a particular pulldown, Status and Assigned To fields on the Add page. These fields can either be selected by the user on the Add page or selected automatically based on the guidelines described below:

- The combination of the Form and Project fields determine which states are available in Status field via the [Allowed Add States Setting](#). The Allowed Add State setting can be based on a selection made in a particular pulldown (e.g. If Priority is set to 1, the Status field will contain the states from one state group and if Priority is set to 2, the Status field will contain the states from another state group).
- The combination of the Form, Project and Status fields determine which user will be assigned to a record via the [State Managers](#) setting if <State Manager> is selected in the Assigned To field on the Add page. The State Managers can be based on a selection made in a particular pulldown (e.g. If Product is "Product A", assign the record to "Developer One". If Product is "Product B", assign the record to "Developer Two".)
- If the Allowed Add States or the State Managers are based on a particular field and the particular field is **not visible** on the Add page, the user **cannot** select a value in the field for the new record. When a new record is saved, the field is set to the [default](#) value and inherits the Allowed Add States or State Manager set for that value.
- When the Status field is **visible** on the Add page, the user can accept the default for the Status field (by not making a selection), which will route the record to the state listed in the field [Default Add State](#) for the combination of Form, Project and pulldown field selected in the record. If the user chooses to make a selection for the Status field, when the new record is saved, it will be routed to the state selected by the user.
- When the Status field is **not visible** on the Add page, the user **cannot** select a state. When the new record is saved, it is routed to the state configured as the [Default Add State](#) for the combination of Form, Project and pulldown field selected in the record.
- When the Assigned To field is **visible** on the Add page, the user can accept the default for the Assigned To field (by not making a selection), which will assign the new record to the [State Manager](#) for the combination of Form, Project, pulldown and Status selected in the record. If the user chooses to make a selection for the Assigned To field, when the new record is saved, it will be assigned to the user selected in the Assigned To field.
- The value State Manager can be listed as the default for the Assigned To field when the General Preference [Include State Manager in the Assignee List on Add operation](#) is enabled. When a new record is saved with "State Manager" selected, the record will be assigned to the [State Manager](#) for the combination of Form, Project, pulldown and Status selected in the record.
- When the Assigned To field is **not visible** on the Add page, the user **cannot** select an assignee. When the new record is saved, it is assigned to the [State Manager](#) for the combination of Form, Project, pulldown and Status selected in the record.
- If the fields Status, Assigned To, pulldowns (fields that settings are based on) are **not visible** on the Add page, the newly added record will be saved with the pulldowns set to their default values, Status set to the Default Add State for the default value of the pulldown it is based on and Assigned To set to the State Manager for the Default Add State for the combination of Form and Project selected in the record.

### Automatic Assignment Guidelines for the Task Operation

When a record is processed using the Task Operation, the settings in the [transition](#) selected determine whether automatic assignment is used.

- If the [State Manager](#) settings for the combination of Form and Project are based on a particular pulldown, the value of the pulldown field in the record is used to determine the State Manager.
- If a transition has **New Assignee** set to "<State Manager>", the record will be routed to the State Manager for the **New State** that corresponds to the transition.

Each workflow is a set of steps that are used to process a record. Each step can be represented by a state. States can be used in one or multiple workflows. After adding states to a workflow, create [transitions](#), or paths, to move records from one state to another and [state groups](#) to create collections of states to be used in reports and workflow settings.

### Global States List

OK

Add State

State Groups

Options	State Name (Status)	Order	Transition Label Style	Used In Workflows
<a href="#">Edit</a> <a href="#">Delete</a>	Reported	1	Radio	Default Workflow , Support
<a href="#">Edit</a> <a href="#">Delete</a>	Scheduled	2	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	In Development	3	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Fixed	4	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	In Test	5	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Tested	6	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Released	7	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Deferred	8	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Duplicate	9	Radio	Default Workflow
<a href="#">Edit</a> <a href="#">Delete</a>	Closed	10	Radio	Default Workflow , Support
<a href="#">Edit</a>	Not Applicable	15		Empty Workflow

OK

Add State

State Groups

### Adding a State

To **add** a new state:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Global States** button
5. Click on the **Add State** button
6. Make selections in the [options](#) presented. These options are described in the [Properties of a State](#) section.
7. Click on the **OK** button to save the new state
8. Click **OK** to return to the **Global States List** or click on the **Add Another State** button to create another state.

### Properties of a State

#### State Name

Name of the state

#### Order

The order of the state. This will determine the order in which it appears in the **Global States List** and a workflow's **Available States** list. You may wish to order

the states according to their place in a workflow process. For example, if Reported is the first state for the default workflow, you may want to specify "0" as the order for this state. States which have the same value specified in the order field will be listed alphabetically.

### Transition Label Style

The style of the labels that will be displayed when a transition is displayed in the Task operation. You can choose from three types of label styles:

- Radio  
Transition options will be displayed as a radio button selection (listed vertically).
- Buttons  
Transition options will be displayed as clickable buttons (listed horizontally).
- Pulldown  
Transition options will be listed in a single pulldown menu.

### Editing a State

To **edit** a state:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Global States** button
5. Click on the **Edit** button listed to the left of the state you wish to modify
6. Make the desired changes to the state's [properties](#)
7. Click **OK** to save the changes

### Deleting a State

Before a state can be deleted, Tracker will check if any of the following conditions exist. If any of the conditions exist, you will be prompted to make changes to select a replacement or change the configuration accordingly:

- Whether the state is selected as the [Default Add State](#) for any forms in workflows that contain the state you are deleting
- Whether the state is added to any [workflows](#)
- Whether the state is selected in the Status field for any records

When deleting a state, the following items will be affected:

- Whether the state is selected for "New State" in any [transitions](#)
- Whether the state is selected in any [Email Rules](#)
- Whether the state is selected as part of the criteria in any [Saved Queries](#) or [Metrics](#)
- Whether the state is selected as the Default State for [Incoming Mail](#)
- Whether the state is selected for publishing articles to the [Knowledge Base](#)

Deleting a state will remove the state's [transitions](#) and [state managers](#).

To **delete** a state:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button
4. Click on the **Global States** button
5. Check the **Used In Workflows** column. If there are any workflows listed, click on the **OK** button to return to the **Manage Workflows** section.

Select a workflow that was listed in the Used In Workflows column in the **Workflows** pulldown at the top. The page will be refreshed to display the properties of the selected workflow.

Click on the + icon to the left of a form in the **Forms** section. Check to ensure that the state you wish to delete is not listed as the **Default Add State** for the form. If the state is selected as the Default Add State for a form, click on the **Manage** link to the right of **Default Add State Settings**. Select another state for Default Add State to replace the one you wish to delete. You may have to apply this change to other values in a pulldown if the Default Add State setting is [based on a particular pulldown field](#). Click **OK** to save the changes and click **OK** again to return to the Manage Workflows section. Repeat this step for any other forms which have the state selected as the Default Add State.

Click on the **Manage** link to the right of **States**. Click on the state you wish to delete and click on the **Remove** button. If there are any [related items](#), you

will be prompted to delete the items or select a replacement state. Click **OK** to save the change and click **OK** to return to the Manage States for a Workflow section. Click **OK** again to return to the Manage Workflows section. Repeat the above steps for any other workflows that were listed in the Used In Workflows column.

Click on the **Global States** button

6. Click on the **Delete** button listed to the left of the state you wish to remove. Click **OK** to confirm the operation. Click **OK** again to confirm and click **OK** once again after the state has been deleted.

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## State Groups

Often when formulating criteria for queries and charts or setting up a workflow, you may wish to limit the criteria or the workflow options to a particular group of states. Tracker allows you to do this by defining **State Groups**. A State Group is a collection of workflow states that appears as a choice on the Query, Metrics, and Workflow sections. One example of using state groups is to create a state group which contains only those states in which records are considered active (e.g. all records which are not closed, on hold or in any other state where they are not being actively processed). This "Active" state group could be used when running reports to limit the data returned by the report to only "active" records.

By default, a state group called "All", which contains all states, is available. To view the state groups currently available in the workgroup:

1. Login to the [workgroup](#) as Admin.
2. Click on the **Admin** icon.
3. Click on the **Managing Workflows** button in the Admin section
4. Click on the **Global States** button
5. Click on the **State Groups** button
6. The state groups will be listed in alphabetical order. The **States In This State Group** column shows the states which are included in the state group.

## Adding a State Group

To **add** a State Group:

1. Login to the [workgroup](#) as Admin.
2. Click on the **Admin** icon.
3. Click on the **Managing Workflows** button in the Admin section
4. Click on the **Global States** button
5. Click on the **State Groups** button
6. Click on the **Add State Group** button
7. Enter a name in the **State Group Name**, then click on the **OK** button
8. Click on the **Add States to this State Group** button to add states to the new state group or click **OK** to return to the State Groups section
9. To add states to the state group, click on a state in the **Available Global States** column, then click on the **Add** button to move it to the **States In This State Group** column. Repeat this until all states you wish to add are in the States In This State Group column.
10. Click **OK** to return to the State Groups page

## Editing a State Group

To **edit** a state group:

1. Login to the [workgroup](#) as Admin.
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button in the Admin section
4. Click on the **Global States** button
5. Click on the **State Groups** button
6. Click on the **Edit** button to the right of the state group you wish to modify
7. Edit the name of the state group by changing the **State Group Name** field
8. Click **OK** to save the change
9. Click **OK** when the confirmation page is displayed to return to the State Groups section

## Adding or Removing States From a State Group

To **add** or **remove** states from a state group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button in the Admin section
4. Click on the **Global States** button
5. Click on the **State Groups** button
6. Click on the **States** button to the left of the state group you wish to modify

7. To remove a state from the state group, click on the state in the **States In This State Group** column, then click on the **Remove**. To add a state to the state group, click on the state in the **Available Global States** column, then click on the **Add** button.
8. Click on the **OK** button to return to the State Groups section

## Deleting a State Group

When removing a state group, Tracker will check the following items and ask you to either select a replacement for the state group you are removing or choose to delete the related item:

- Whether the state group is selected for the "Allowed Add States" option in a [Workflow Form](#)
- Whether the state group is selected for the "Articles in these State(s) are visible" option in the [Knowledge Base Preferences](#)
- Whether the state is selected in any [Email Rules](#)
- Whether the state group is selected for "New State" in the Prompt with <State Group> in any [transitions](#)
- Whether the state is selected as part of the criteria in any [Saved Queries](#) or [Metrics](#)

To **delete** a state group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Manage Workflows** button in the Admin section
4. Click on the **Global States** button
5. Click on the **State Groups** button
6. Click on the **Delete** button to the left of the state group you wish to modify, then click **OK** to confirm the action

If the state group is selected for the "Allowed Add States" option in a [Workflow Form](#) or is selected for the "Articles in these State(s) are visible" option in the [Knowledge Base Preferences](#), you will be prompted to select a different state group for these options before you can delete the state group. Change the options mentioned and then repeat the above steps to delete the state group

If the state group is selected in any [Email Rules](#), is selected for "New State" in the Prompt with <State Group> in any [transitions](#), or is selected as part of the criteria in any [Saved Queries](#) or [Metrics](#), you will be prompted to either select a replacement or delete the items. Click **OK** after selecting replacements / deleting related items.

7. Click **OK** after the state group has been deleted

NetResults Tracker







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Workflow Transitions

A **transition** is a path used to move a record from one state to another in the workflow or can be used to assign the record to another user. A transition can include fields called **Task Fields** that require a user to enter some information into a record before it moves to the next step in the workflow. In some cases a transition may be a loop (a transition which keeps the record in the same state). A loop transition is used when a record simply needs to have information added to a field, but does not move to another state and / or does not move to another assignee.

Please note: The "+" icon is available for expanding the Transitions sub-sections in the Manage Workflows section. The "-" icon is available for collapsing sub-sections.

**Manage Transitions for State: Reported (Workflow: Default Workflow)**

Options	Transition Name	Order	New State	New Assignee
<input type="button" value="Edit"/> <input type="button" value="Task Fields"/> <input type="button" value="Alerts"/> <input type="button" value="Delete"/>	Schedule	5	Scheduled	<State Manager>
<input type="button" value="Edit"/> <input type="button" value="Task Fields"/> <input type="button" value="Alerts"/> <input type="button" value="Delete"/>	Close	10	Closed	TBD
<input type="button" value="Edit"/> <input type="button" value="Task Fields"/> <input type="button" value="Alerts"/> <input type="button" value="Delete"/>	Defer	15	Deferred	<State Manager>
<input type="button" value="Edit"/> <input type="button" value="Task Fields"/> <input type="button" value="Alerts"/> <input type="button" value="Delete"/>	Mark Duplicate	20	Duplicate	TBD

## Defining Transitions for a State

The transitions for a particular state can be managed from the [Managing Workflows](#) section or in the [Available States](#) section.

To **manage** the transitions for a state in the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the state for which you want to manage the transitions
5. Click on the **Manage** link to the right of **Transitions**. Use the steps in the sections below for [adding](#), [editing](#), or [deleting](#) a transition.

To **manage** the transitions for a state in the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column, then click on the **Transitions** button Use the steps in the sections below for [adding](#), [editing](#), or [deleting](#) a transition.

## Adding a New Transition

To **add** a new transition:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Transitions** button to the left of the state for which you want to define transitions
5. Click on the **Add Transition** button

6. Make selections for the properties described below
7. Click **OK** to save the transition

**Edit Transition: Schedule for State: Reported (Workflow: Default Workflow)**

OK Cancel

Name

Order

New State

New Assignee

History Comment

Allow Attachments

Allow Source Code Files

Clone Record  Include  Attachments  Source Code Files

Make Visible To Users / User Groups

<All Users>  
 <Assignee>  
 <State Manager>  
 <Reporter>  
 [Admins]  
 [Developers]  
 [Managers]

Make Visible To Forms

Record Form

OK Cancel

## Properties of Transitions

The following options will be presented when you add or modify a transition:

### Transition Name

Enter a label that will be used as the name of the transition during the Task operation

### Order

The order of the transition. This will determine the order in which it appears in the transitions table as well as in the list displayed during the Task operation. Transitions which have the same value specified in the order field will be listed alphabetically.

### New State

The state to which the record will be routed when this transition is selected during the Task operation. For this option, you may select one of the following:

- A specific state  
Any state in the Workflow State table can be selected as the new state for a transition.
- Prompt with <State Group>  
Selecting this option will allow the user performing the Task operation to choose from a list of all states within a particular state group as the new state for the record. When selecting this option, please select a state group from the second pulldown listed after **New State**. Review the [Defining State Groups](#) section for information on creating a state group. The current state of the record will be selected by default during the task operation if the current state is part of the state group selected. Otherwise, the states in the state group will be listed in alphabetical order.
- Previous State

This option will send the record to the most recent state the record was in prior to its current state. Tracker will examine the Record History to determine the previous state.

### New Assignee

The user to whom the record will be assigned when this transition is selected during the Task operation. For this option, you may select one of the following choices listed below:

- <State Manager>  
The record will be routed to the State Manager based on the New State for this transition and the State Manager settings for the combination of form and project set in the record. State Managers can be set in the [Managing Projects](#) section.
- <Same Assignee>  
This option can be used for transitions where a record does not need to be assigned to a different user. For example, if a record simply needs to be updated by the user who is currently assigned to the record.
- Prompt with <User Group>  
This option enables you to restrict the list of possible assignees to the members of a user group. The user performing the Task operation will select the new assignee from a list of users within the User Group that you specify for this option. When selecting this option, please select a user group in the second pulldown next to **New Assignee**. In the third pulldown next to New Assignee, select whether the user "TBD" should be included or excluded from this user group when presented during the task operation. TBD is a built-in user that can be used as a place holder or can signify "assigned to no one". Please review the [User Groups](#) Help section for information on creating a user group. The current assignee will be selected by default during the task operation if the current assignee is a member of the user group displayed. Otherwise, the users in the user group will be listed in alphabetical order.
- <Last Assignee for New State>  
When selecting this option, Tracker will examine the Record History to find the last user who was assigned to this record when it was in the state specified in the field **State** for this transition. For instance, if the **New State** is "Scheduled", Tracker will look in the record history for the record and find the last entry where this record was in the Scheduled state. The assignee listed in this entry will become the new assignee for this record. If the record has not passed through the state selected as the New State, another transition will have to be used to process that record since there is not a user who was the Last Assignee.
- Last Assignee for <State>  
When selecting this option, please select a state in the second pulldown next to **New Assignee**. With this option selected, Tracker will examine the Record History to find the last user who was assigned to this record when it was in the state specified in the second pulldown. For instance, if the state selected is "Scheduled", Tracker will look in the record history for the record and find the last entry where this record was in the Scheduled state. The assignee listed in this entry will become the new assignee for this record. If the record has not passed through the state selected for this option, another transition will have to be used to process that record since there is not a user who was the Last Assignee.
- <Reporter>  
This will assign the record to the original user who reported the issue according to the value of the Reported By field.
- <LoginUser>  
This will assign the record to the user performing the Task operation. An example where this option can be used is in cases where a record is assigned to another user, such as TBD, and the user needs to assign the record to his or herself using the Task operation.
- A specific user  
Any user with "Internal" selected as the user type can be selected as the new assignee for a transition. The user type is set when the user account is created in the [User Management System](#).

### History Comment

- Selecting **Required** for this option will require the user to enter a history comment when selecting this transition during the Task operation.
- Selecting **Optional** will allow the user to leave this field blank when this transition is chosen during the Task operation.
- When **Do Not Display** is selected here, the history comment field will not be presented to the user when this transition is chosen during the task operation. Even though the history comment is not displayed, the record history will still reflect that the task operation was performed on a record. In addition, if Do Not Display is selected and there are no task fields configured for the transition, the transition is set up for [fast tasking](#). Up to 2000 characters can be entered into the History Comment.

### Allow Attachments

Checking the box for this option will allow the user performing the Task operation to add attachments to the record being processed. When selecting a transition with this option enabled, the user will have the option "Add Attachment(s)" available for selection during the Task operation.

### Allow Source Code Files

Checking the box for this option will allow the user performing the Task operation to add attachments to the record being processed. When selecting a transition with this option enabled, the user will have the option "Associate Source Code File(s)" available for selection during the Task operation. This option will only be available in a transition when the [Source Code Control Integration](#) is enabled in the [General Preferences section](#).

### Clone Record

- If **Yes** is selected for this option, Tracker will first create a copy (clone) of the record which the user selected for the Task operation (a new record will be added with all field values the same as the record that was selected), then it will perform the Task operation on the newly created record (clone). The originally selected record ("parent" of the clone) will only have its Record History updated to note that a clone was made of the record. The clone ("child" record) will also have an extra Record History entry to note that it was created as a clone of the parent. Whether or not an [Email Rule](#) (with a condition such as "change of Assignee") is triggered by this Task operation will be based on a comparison between the parent record (record being copied) and the child record (copy) after the Task operation completes (e.g. is the Assignee different for the child than for the parent). No "Add" Email Notification Rules will be triggered (to avoid getting one notification for an Add and a second one for a Task for what, to the end user, is a single Task operation). Additional general information on cloning a record is available in the [Cloning a Record](#) section of the View page help in the Users Guide.
- If **Yes** is selected for this option, you can also choose to have the file attachments and/or source code file associations copied from the parent record by checking the Attachments and/or Source Code Files boxes.

### Visibility

Transition Visibility is the feature that allows you to limit which users and user groups can see this transition available when performing the task operation on a record. Transition Visibility can be set by modifying each transition using the **Make Visible to These Users** property or by modifying each user group. If you prefer to set visibility by user group, review the Transition Visibility information in the [User Administration - Groups](#) section. For this option, you may select one of the following:

- A specific user group  
Any user group in the User Administration section can be selected as a user group to which this transition will be visible.
- <All Users>  
Selecting this option will make the transition visible to all users (all members of the Users and RestrictedUsers groups).
- <Assignee>  
Selecting this option will make this transition visible to the user currently selected in the Assigned To field of the record.
- <State Manager>  
Selecting this option will make this transition available to the user selected in the State Manager settings for the combination of Form and Project currently set in the record.
- <Reporter>  
Selecting this option will make this transition visible to the user listed in the Reported By field of the record.

Transitions must also be visible to at least one form in the **Make Visible to Forms** field. The forms available to be selected in this field are determined by the forms selected in the [Available Forms](#) section for the selected workflow.

### Fast Tasking

Fast Tasking is the process where a transition is chosen and the user clicks on the OK button, the record will immediately be updated because it is set such that there are no task fields and the history comment should not be displayed. If a transition is configured to allow fast tasking and is configured to display alert settings during the task operation, the alert settings will not be displayed during the task operation. The default alert settings for the transition will be used instead.

---

## Editing a Transition

Transitions can either be edited from the [Managing Workflows](#) section or the [Available States](#) section.

To **edit** the transitions for a state in the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the state for which you want to edit the transitions
5. Click on the **Edit** link to the right of the transition you wish to edit
6. Make any desired changes to the [properties](#) of the transition
7. Click **OK** to save the changes

To **edit** the transitions for a state in the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column, then click on the **Transitions** button
6. Click on the **Edit** button to the left of the transition you wish to modify

7. Make any desired changes to the [properties](#) of the transition
8. Click **OK** to save the changes

## Removing a Transition

Transitions can either be deleted from the [Managing Workflows](#) section or the [Available States](#) section.

To **delete** the transitions for a state in the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the state for which you want to edit the transitions
5. Click on the **Manage** link to the right of **Transitions**
6. Click on the **Delete** button to the left of the transition you wish to remove, then click **OK** to confirm the operation

To **delete** the transitions for a state in the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column, then click on the **Transitions** button
6. Click on the **Delete** button to the left of the transition you wish to remove, then click **OK** to confirm the operation

## Defining Fields For the Task Operation

For each transition within a particular state, you can specify which fields should be presented to the user during the Task operation. By only presenting the user with the necessary fields, you can ensure each user will correctly adhere to the workflow process.

Task fields for a transition can be managed from the [Managing Workflows](#) section or the [Available States](#) section.

**Workflows List**

**Workflows:** Product Issue Process

[-] **Product Issue Process** [Edit | Expand All | Collapse]

[-] **States** [Manage | Expand All | Collapse]

[-] **Reported**

[-] Next States : Closed , Deferred , Duplicate , Scheduled

[-] **Transitions** [Manage]

[-] **Schedule** [Edit]

[-] New State : Scheduled

[-] New Assignee : <State Manager>

[-] Forms : Issue

[-] **Task Fields** (2) [Manage]

[-] Planned For Version (RelNum, Optional, Not Initialized, 28)

[-] Priority (Pulldown, Optional, Not Initialized, 34)

[-] **Alert** (Yes) [Edit]

[-] Set Alert : Yes

[-] Send Alert : 1 day(s) after <Task Date>

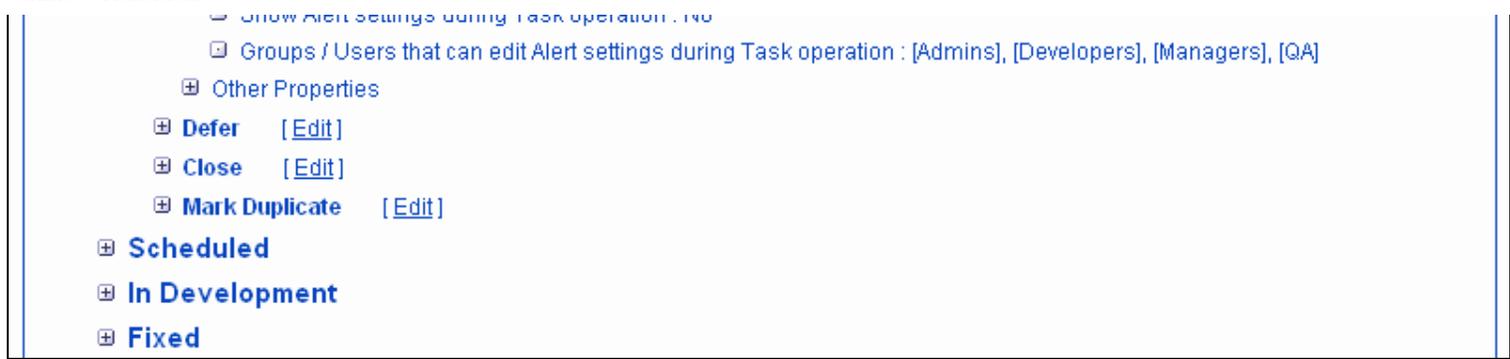
[-] Repeat Alert : Every 1 day(s); Stop after 3 alert(s)

[-] Send Alerts To : <Assignee>, <State Manager>

[-] Show Alert settings during Task operation : No

[-] Groups / Users that can edit Alert settings during Task operation : [Admins], [Developers], [Managers], [QA]

## Workflow Transitions



To **add** Task Fields to a transition from the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the appropriate state
5. Click on the "+" icon to the left of the appropriate transition
6. Click on the **Manage** link to the right of **Task Fields**
7. Click on a field in the **Available Fields** column, then click on the **Add** button
8. The task field [properties](#) will be displayed at the bottom. Make selections for these properties, then click on the **Update** button to save your selections
9. Click on the **OK** button to return to the Transition list

To **add** Task Fields to a transition from the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column
6. Click on the **Transitions** button
7. Click on the **Task Fields** button to the left of the appropriate transition
8. Click on a field in the **Available Fields** column, then click on the **Add** button
9. The task field [properties](#) will be displayed at the bottom. Make selections for these properties, then click on the **Update** button to save your selections
10. Click on the **OK** button to return to the Transition list

Task field properties can be edited from the [Managing Workflows](#) section or the [Available States](#) section.

To **edit** the properties of a Task Field in a transition from the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the appropriate state
5. Click on the "+" icon to the left of the appropriate transition
6. Click on the **Manage** link to the right of **Task Fields**
7. Click on the field in the **Fields Used In This Transition** column, then click on the **Edit** button
8. Make changes to the [properties](#) for the field when it is presented during the Task operation
9. Click on the **Update** button to save your selections
10. Click on the **OK** button to return to the Transition list

To **edit** the properties of a Task Field in a transition from the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column
6. Click on the **Transitions** button
7. Click on the **Task Fields** button to the left of the appropriate transition
8. Click on a field in the **Fields Used In This Transition** column, then click on the **Edit** button
9. Make changes to the [properties](#) for the field when it is presented during the Task operation
10. Click on the **Update** button to save your selections
11. Click on the **OK** button to return to the Transition list

Task fields can be removed from a transition either from the [Managing Workflows](#) section or the [Available States](#) section

To **remove** Task Fields to a transition from the [Managing Workflows](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the "+" icon to the left of the appropriate state
5. Click on the "+" icon to the left of the appropriate transition
6. Click on the **Manage** link to the right of **Task Fields**
7. Click on a field in the **Fields Used In This Transition** column, then click on the **Remove** button
8. Click on the **OK** button to return to the Transition list

To **remove** Task Fields to a transition from the [Available States](#) section:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Workflows** button
4. Click on the **Manage** link to the right of **Available States**
5. Click on a state in the **States In Use** column
6. Click on the **Transitions** button
7. Click on the **Task Fields** button to the left of the appropriate transition
8. Click on a field in the **Fields Used In This Transition** column, then click on the **Remove** button
9. Click on the **OK** button to return to the Transition list

## Properties for Task Fields

**Manage Task Fields for Transition: Mark Fixed (State: In Development in Workflow: Default Workflow)**

Fields Used In This Transition		Available Fields
32 Description (TextArea) <b>80 Fix Detail (TextArea)</b> 80 Fixed Date (Date)	<input type="button" value="Edit"/>  <input type="button" value="Remove »"/>  <input type="button" value="« Add"/>	0 PRN (Integer) 20 Reported By (Reporter) 20 Title (Text) 22 Product (Pull-down) 24 Component (Pull-down) 24 Reported in Version (RelNum) 25 Sub-Component (Pull-down) 26 Platform (Pull-down) 28 Severity (Pull-down) 30 Priority (Pull-down) 34 Workaround (TextArea) 35 Related Support PRNs (Link - Forward) 40 Deleted? (YesNo) 60 Date Reported (Date) 75 Planned for Version (RelNum)

---

**Edit Task Field Properties**

Task Field **Fix Detail (TextArea)**

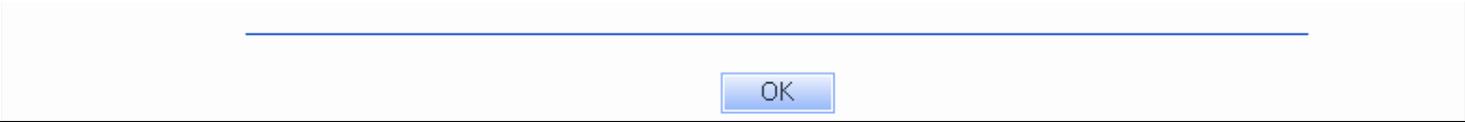
Field Order

Input Type  ▾

Initialize (Reset)  ▾

Annotate  ▾

Append  ▾



The following properties can be set for Task Fields when they are presented during the Task operation:

### Field Order

The order in which the Task Field will appear on the page during the Task operation relative to the other task fields configured for the same transition. By default, the order will be the order value as listed in the [Managing Fields](#) section. Select an integer value. If multiple task fields have the same value for the order field, the task fields will be listed in alphabetical order.

### Input Type

Specifies whether the field is required, optional, or read only when it appears during the Task operation. Selecting **Required** indicates that a user will not be able to complete the Task operation until something is entered or a different value selected for the field. For Integer, Float, Text, TextArea, or Date types this means that a blank value will not be allowed. For pulldown fields, this means that the user must select a value other than the initial value displayed on the form. Selecting **Optional** indicates that the user is not required to enter information into the field to complete the Task operation. Selecting **Read Only** indicates that the contents of the field will be displayed for the user's reference, but the field cannot be modified.

You may wish to highlight required fields during the Task operation with a particular color, **bold** type or with a special character (e.g. "\*\*"). This can be done by configuring the [Required Field Highlights](#) option in the General Preferences section.

### Initialize (Reset)

For Date fields, this property specifies whether the field should be automatically initialized to the current date/time when it appears on the Task page. You may wish to use a combination of setting the **Type** to "Read Only" and **Initialize (Reset)** to "Yes" for date fields. This combination will allow the date field to be set to the current date and time when the Task operation is performed, but the user will not be allowed to modify the date field.

For Text, TextArea, URL, Integer, and Float fields, this property specifies whether the field should be reset to blank. By setting the **Initialize (Reset)** property to "Yes" and setting the **Type** property to "Required", you can force a new value to be entered for a Text, TextArea, URL, Integer, or Float field. This property can be useful in combination with the [Clone Record](#) option in a Transition as you may find that you would like several fields to be reset when creating a copy (clone) of an existing record.

**Note 1:** For Float and Integer fields, if you set the **Initialize (Reset)** property to "Yes" and the **Type** property to "Read Only", the field value will be set to 0 (or 0.0) because Float and Integer fields must always have a value (blank is not a valid value for Float or Integer).

**Note 2:** For all field types, if you set the **Initialize (Reset)** property to "Yes" the existing value (if any) of the field will be overwritten. Any data previously entered in the field will be lost.

For Pulldown fields, this property specifies whether the field should be reset to its default value. By setting the **Initialize (Reset)** property to "Yes" and setting the **Type** property to "Required", you can force a user to select a value other than the default.

For Dependent Pulldown fields, if the parent pulldown is set to be initialized, the parent pulldown will be set to its default value. The value of child pulldown menus may be changed to its default relative to value of the parent pulldown if:

- The child pulldown is also a task field in the same transition and is set to be initialized OR
- The child pulldown is also a task field in the same transition and a value other than the default is selected in the parent pulldown (selecting another value in the parent will cause the items listed in the child pulldown to be updated based on the dependencies configured between the two fields).

If the child pulldown is not present as a task field, it will retain the same value even if the value does not match the value set for the parent pulldown.

For RelNum fields, this property specifies whether each component of the field should be reset to its default value.

For YesNo fields, this property specifies whether the field should be set to "Yes", its default value.

### Annotate

This option will not be available if "Read Only" was selected for the option **Input Type**. This option determines whether any additions to the TextArea field will be preceded with an annotation when the field is modified during the Task operation. The annotation includes a date and time stamp when the field was modified and the User ID of the user who modified the field. Select "Optional" if you wish to have the annotation be included in the field only when the user clicks on the Annotate button. Select "Automatic" if you wish to have the annotation included automatically when the field is modified. When selecting Automatic, the Annotate button will not be displayed. The annotation will be applied to the field (only if it was modified) when the user clicks on the **OK** button to complete the Task operation. Automatic will not be available as a selection if "Yes" was selected for the option **Initialize (Reset)**. Select "Unavailable" if you do not wish to have the field annotated when it is modified.

### Append

This option will not be available if any of the following conditions applies:

- "Read Only" was selected for the option **Input Type**
- "Yes" was selected for the option **Initialize (Reset)**

- "Automatic" was selected for the option **Annotate**

This option determines whether any additions to the TextArea field will be appended to the end of the existing data in the field. Selecting "Yes" indicates that any new data added to the field should be appended to the existing data. This option preserves any existing data in the field from being modified during the Task operation. Any existing data is not displayed in the field when "Yes" is selected for this option. Selecting "No" indicates that the contents of the field can be modified by the user performing the Task operation. The user can add new data anywhere in the TextArea field.

## Alerts

Alerts are email notification messages that can be sent automatically by Tracker at a later date and time to remind a user or group about a record (e.g. send an alert a day before a deadline date in the record passes) or to notify people about a lack of change of status (e.g. record should be processed within a certain time threshold, send an alert if this is not done). Alert settings can be configured for each transition such that these settings will be applied to any record processed with the transition. It is also possible to allow users to be prompted to configure the Alert settings during the Task operation.

To **configure default alert settings** for a transition:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon in the top button bar
3. Click on the **Managing Workflows** button
4. Select the desired workflow in the **Workflows** pulldown at the top. The page will be refreshed with the properties of the selected workflow.
5. Click on the "+" icon to the left of the state which contains the desired transition
6. Click on the **Manage** link to the right of **Transitions**
7. Click on the **Alerts** button for the desired transition
8. Make selections for the fields described below, then click **OK** save the changes

**Set Default Alert Settings for Transition: Mark Fixed (State: In Development in Workflow: Default Workflow)**

OK Cancel

**Set Alert**  Yes  No  Leave Current Values

**Send Alert** 1 day(s) after <Task Date>

**Repeat Options**  Repeat every 1 day(s)  Stop after 3 alert(s)  Repeat forever

**Send Alerts To**

<Assignee>  
 <Reporter>  
 <State Manager>  
 [Admins]  
 [Developers]  
 [Managers]

**Show Alert settings during the Task operation**  Yes  No

**Groups / Users that can edit Alert settings during the Task operation**

[Admins]  
 [Developers]  
 [Managers]  
 [QA]  
 [Users]  
 Admin

OK Cancel

### o **Set Alert**

Selecting "Yes" indicates an alert should be generated for a record that has been tasked using this transition and using the alerts settings below. By selecting this option, the user will not be prompted to Set the Alert Settings when selecting this transition. Selecting "No" indicates that no alert should be sent when this transition is selected for a record. Selecting "Leave Current Values" indicates that an alert should be generated for a record that has been tasked using this transition, but the existing alert settings in the record should be used instead of the settings for this transition. The existing alert settings are those that were set during the Add operation or by the transition selected the last time a task operation was performed on the record.

### o **Show Alert settings during the Task operation**

Selecting Yes indicates that the user should be prompted to select alert settings when this transition is selected during the Task operation. If a transition is configured for "fast-tasking" (the transition has no task fields and history comment is set to "do not display"), then the alert settings will not be displayed during the Task operation.

- o **Groups / Users that can edit alert settings during the Task operation**

Click on the groups and / or users that should be allowed to edit the alert settings during the Task operation when selecting this transition. To select multiple users and / or groups, hold down the **CTRL** button on your keyboard while clicking on each user and group you would like to select.

- o **Send Alert**

The period of time that should pass before the alert is sent. You can enter a number from 1 - 99, select the interval (hour, day, week, or month), select "before" or "after" as the point of reference for the alert, and a starting point for the time period. The starting point can be "<Now>", or can be based on any of the date fields in the record. Example 1: By entering "1 day after <Now>", the alert will be sent 1 day after the record is added. Example 2: By entering "1 day before <Date Field>", the alert will be sent 1 day before the date entered in the date field selected.

If a date field is selected as the date to generate an alert and this date field has no value in a record, an alert will not be generated. If a date field is selected as the date to generate an alert and this date field is later removed from the record (deleted in the [Managing Fields](#) section, then <Task Date> will be set as the date to generate an alert (to replace the date field that was removed).

- o **Repeat options**

Check the box to allow the alert to be sent multiple times after the initial time period (in Send Alert field above) has passed. Select the repeat period by entering a number from 1 - 99 and the interval (hour, day, week, month). Then, select how many times the alert should be repeated. Select either **Stop after X alerts** where X is a number from 1 - 10 or **Repeat forever**. Repeat forever will continue to repeat the alert periodically until the state of the record is changed.

- o **Send Alerts To**

Click on the groups and / or users who should receive the alert message if the record's state has not changed when the configured time period has passed. To select multiple users and / or groups, hold down the **CTRL** button on your keyboard while clicking on each user and group you would like to select.

9. After clicking **OK** to save the changes, click on the **Alerts** button for another transition to configure the default alerts settings.

## Viewing and Editing Alert Settings during the Task Operation

When the task operation is performed on a record, the user may be prompted to configure alert settings depending on the default alert settings for the transition selected (setting the default alert settings for a transition are defined in the [Configure Default Alert Settings per Transition](#) section above).

In order for the user to **view** the alert settings when performing the task operation for a record, the transition selected must have **Show Alert Settings during Task Operation** set to "Yes" and the user must be a member of a group with the [View Alerts Settings](#) user group privilege. After selecting a transition during the task operation, the user meeting the criteria mentioned above will be able to see the alert settings section, but cannot modify the values. The **Additional Information** field can be modified to add a note or other information to be included in the alert notification message. Click **OK** to complete the Task operation.

For a user to **edit** the alert settings during the Task operation, the transition selected must have **Show Alert Settings during Task Operation** set to "Yes" and the user (or a group of which the user is a member) must be specified in **Groups / Users that can edit Alert Settings during the Task Operation**. After selecting a transition, the user meeting the criteria mentioned above will see the alert settings section. The user can modify the following alert settings. By default, the values displayed here will be the values selected in the default Alert settings for the transition selected.

**Set Alert**

**Send Alert**  1 day(s) after <Task Date>

If Status is unchanged as of [ ]

Until this date [ ]

**Repeat Options**

Repeat every 1 day(s)

Stop after 3 alert(s)

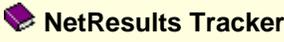
Repeat forever

**Send Alerts To**

- <Assignee>
- <Reporter>
- <State Manager>
- [Admins]
- [Users]

**Additional Information** [ ]

OK Cancel

	
<b>Email Configuration</b>	<a href="#">Help Topics</a> <<    >>

## Overview

Tracker is fully integrated with Internet standard SMTP email, supporting the following features:

### Outgoing Mail Features

- **Email Notification** messages can be sent to users and groups triggered by an action performed on a record (adding, editing, tasking, deleting) or a change in status or assignment. [Email Rules](#) can be configured to trigger email notifications.
- **Alerts (Enterprise Edition Only)** messages can be sent to users and groups at a designated date and time as a reminder about a record or a means of escalating a record. Review the [Alerts](#) Help section for information about enabling and configuring the Alerts feature.
- **Discussion (Enterprise Edition Only)** messages can be sent to users and groups to invite them to participate in a discussion or to notify them about a new post to a discussion. Review the [Discussion](#) Help section for information about enabling and configuring the Alerts feature.

### Incoming Mail Feature

- The **Submit via Email** feature allows issues to be created in Tracker from incoming email messages

To configure settings related to email features:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Email Configuration** button

Select an Email Configuration Task	
<input type="button" value="OK"/> <input type="button" value="Continue »"/>	
<b>Outgoing Mail</b>	
<input checked="" type="radio"/>	Set Email Server Configuration
<input type="radio"/>	Set Global Email Options
<b>Incoming Mail</b>	
<input type="radio"/>	Set Global Email Options
<input type="button" value="OK"/> <input type="button" value="Continue »"/>	

The following sections provide details of setting the Outgoing and Incoming Mail configuration:

- [Email Notification Messages](#)
- [Examples of Email Notification Messages](#)
- [Outgoing Mail Server Configuration and Global Options](#)
- [Email Rules](#)
- [Incoming Mail Configuration](#)
- [Sending an Administrative Email](#)

## Overview

The following section discusses the features and operations that can trigger email notification messages to be sent from Tracker.

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## Alerts

The Alerts feature can send email notification messages at a designated date and time to remind a user or group about a record or to notify a user or group that a record's status has not changed within a specific period of time. Information on configuring the Alerts feature to send email notification messages can be found in the [Alerts](#) section of this Help guide.

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## Discussion

The Discussion feature can send email notification messages to invite a user or group to participate in a discussion for a record or can notify a user or group about a new post to a discussion thread. Information on configuring the Discussion feature to send email notification messages can be found in the [Discussion](#) section of this Help guide.

---

## Email Notifications triggered by Operations in Tracker

Tracker can be configured to automatically send email notification messages when the following actions are performed on a record:

- **Add**
- **Edit**
- **Delete**
- **Task**
- **Change of Status**
- **Change of Assignment**

Any combination of users and groups can be selected to be notified for each operation mentioned above.

Email notification preferences can be set per workflow and can also be set based on a selection made in a particular pulldown field (Product, Priority, Severity or any pulldown field that you define in the [Manage Fields](#) section). Such customization may be necessary to account for changes in the workflow process or the users participating in the process.

## Add Options

When a record is created, a notification email can be sent to any of the following individuals and / or groups:

### Assignee

The individual who is currently assigned to the record

### Reporter

The individual who reported the record

### State Manager

The manager assigned to the workflow state of the record when it is added

### User Group

The user groups configured within the workgroup will be listed. You can select any user group(s) to receive notification when a record is added

## Edit Options

When a record is edited, a notification email can be sent to any of the following individuals and / or groups:

### Assignee

The individual who is currently assigned to the record

### Assignee (new)

The individual selected in the Assigned To field (if the Assignee is changed during the Edit operation)

### Assignee (previous)

The individual who was the previously assigned to the record (if the Assigned To field is changed during the Edit operation)

### Reporter

The individual who reported the record

### State Manager

The manager assigned to the workflow state of the record when it is edited

### State Manager (new)

The manager assigned to the new workflow state of the record (if the Status field is changed during the Edit operation)

### State Manager (previous)

The manager assigned to the previous workflow state of the record (if the Status field is changed during the Edit operation)

## **User Group**

The user groups configured in the workgroup will be listed. You can select any user group(s) to receive notification when a record is edited.

## **Delete Options**

When a problem record is deleted, a notification email can be sent to any of the following individuals and / or groups:

### **Assignee**

The individual who is currently assigned to the record

### **Reporter**

The individual who reported the record

### **State Manager**

The manager assigned to the workflow state of the record when it is deleted

## **User Group**

The user groups configured in the workgroup will be listed. You can select any user group(s) to receive notification when a record is deleted.

## **Task Options**

When the Task operation is performed on a record, a notification email can be sent to any of the following individuals and / or groups:

### **Assignee**

The individual who is currently assigned to the record

### **Assignee (new)**

The individual assigned to the record (if the Assigned To field is changed during the Task operation)

### **Assignee (previous)**

The individual who was previously assigned to the record (if the Assigned To field is changed during the Task operation)

### **Reporter**

The individual who reported the record

### **State Manager**

The manager assigned to the workflow state of the record when the Task operation is performed

### **State Manager (new)**

The manager assigned to the new workflow state of the record (if the Status field is changed during the Task operation)

operation)

### **State Manager (previous)**

The manager assigned to the previous workflow state of the record (if the Status field is changed during the Task operation)

### **User Group**

The user groups configured in the workgroup will be listed. You can select any user group(s) to receive notification when the Task operation is performed on a record.

## **Assignment Change Options**

When a change of assignment occurs for a record, notification email can be sent to the following individuals and / or groups:

### **Assignee (new)**

The individual the record is being assigned to

### **Assignee (previous)**

The individual the record was assigned to before the change of assignment

### **Reporter**

The individual who reported the record

### **State Manager**

The manager assigned to the current workflow state of the record

### **User Group**

The user groups configured in the workgroup will be listed. You can select any user group(s) to receive notification when a record is re-assigned.

## **Status Change Options**

When a change of state occurs for a record, a notification email can be sent to the following individuals and / or groups:

### **Assignee**

The individual who is currently assigned to the record

### **Reporter**

The individual who reported the record

### **State Manager (new)**

The manager assigned to the new workflow state

### **State Manager (previous)**

The manager assigned to the original workflow state

### **User Group**

The user groups configured in the workgroup will be listed. You can select any user group(s) to receive notification when a record's Status has changed.

You can establish notification rules based on changes to particular states. Examples of notification rules that can be used simultaneously for changes to particular states:

- When the Status of a record is changed to the Closed state, the Reporter, the previous State Manager, and the new State Manager are notified.
- When the Status of a record is changed to Fixed, the Reporter, the new State Manager, and the Managers user group are notified.

Please note that these are just examples of the many combinations that are possible to establish notification rules for a change in state.

Please review the [Manage Workflows](#) section for details on configuring email rules.

Email notification messages can be generated automatically by Tracker triggered by the [actions](#) performed on a record. Notification messages can also be triggered by the use of the [Alerts](#) and [Discussion](#) features. Each of the features above generates a notification message with a unique structure. Common to all message types is the inclusion of hyperlinks to take the user receiving the message to the workgroup, record, or discussion thread specified in the message. The hyperlink is created based on the configuration set for the workgroup in the [Workgroup Management System](#). The structure of each message type is described below.

## Email Notification Messages based on Email Rules

Email Rules can be set for a [workflow](#) or set [based on each option menu item in a pulldown](#). Email Rules can be set to send an email message when an operation is performed on a record (such as adding, deleting, editing, or tasking a record) or when the record's status or assignment has changed. The body of a Tracker email notification message is divided into seven sections which you can configure. Listed from the top (first line of email body) to the bottom, they are as follows:

1. [Greeting](#) - the first line of the email, e.g. "Hello Sue Smith,". The Greeting is part of the [Email Common Content](#) configured for each form in Tracker.
2. [Introduction](#) - a few lines to introduce the email, e.g. a sentence or two to let the user know this is an automated response from Tracker. The Introduction is part of the [Email Common Content](#) configured for each form in Tracker.
3. [Operation Description](#) - a few lines to describe why this email notification is being sent, e.g. this issue has been assigned to you (the recipient of the email). The Operation Description can be configured in each [Email Rule](#).
4. [Link](#) - link (URL) to the record in Tracker (when browsing to the link, record is displayed after you enter your login information). The hyperlink is created based on the configuration set for the workgroup in the [Workgroup Management System](#)
5. [History Comment](#) - the History Comment that was entered by the user who triggered the email, e.g. comment they entered when using the Edit operation to update a record.
6. [Fields](#) - the fields within the record referenced by the email notification. The fields included in the notification message can be limited by user group within a [Signature](#) - the last section of the email, typically used for the signature at the bottom of the email (contact information). The Signature is part of the [Email Common Content](#) configured for each form in Tracker.

The Email Common Content can be configured differently for each [form](#) in Tracker or can be configured [based on each option menu item in a particular pulldown](#) (for example, the Email Common Content can be different for each product or each priority level). The Subject line of the email as well as the Operation Description part of the email body can be configured per email notification rule. Email Rules can also be configured per [form](#) or [based on each option menu item in a particular pulldown](#). Each form or option menu item in a pulldown can have its own unique set of conditions (defined by the email rules) which trigger email notifications. [User Group membership \(privileges\)](#) of the recipient can be used to determine which parts of the email are sent. And, each recipient's personal [preferences](#) are used to customize the content of the email they receive. For example, Date/Time fields will be formatted according to the recipient's time zone and date and time format preferences.

Email notification messages are of the form shown in the example below. This example is a message sent to a user who has been assigned to a record:

Hello Developer Two, **Greeting**

This message was sent from Product Development Tracker. **Introduction**

The following record has been assigned to Developer Two. **Operation Description**

To view this record, browse to Product Development Tracker (nrtracker1). **Link**  
<http://SERVERNAME/nrtracker1/ptlogin.asp?page=view&record=27&formid=1>

History Comment: re-assigned to Developer Two **History Comment**

```
PRN:                27
Project:            Product Development
Form:              Development Issue
Title:             Add a chart wizard
Product:           Our Browser
Platform:         All
Request Type:     Enhancement
Reported In Version: 1 . 2 . 1 . None
Date Reported:    12/01/2006 10:56:18 AM [UTC-0800]
Severity:         2 - Medium
Description:
```

```
-----
==== 12/01/2006 10:56:32 AM [UTC-0800] ==== Development Manager ====
Add a wizard for creating charts.
-----
```

```
Reported By:       Development Manager
Workaround:
Status:           Reported
Assigned To:      Developer Two
Estimated Size:   0.0
Released In Version: None . None . None . None
Planned For Version: None . None . None . None
Total Time:       0.0
Fix Date:
Fix Detail:
Test Description:
Test Date:
Priority:         None
Defer Reason:
Close Detail:
Close Date:
```

Regards,

**Signature**

Tracker Software  
 Product Development Workgroup

**Fields**

The fields that are included in the email notification messages can be customized. Whether a particular field is displayed in the email message is determined by the Field Visibility settings for that field. Field Visibility can be customized for each fields in the [Managing Fields](#) section.

## Alerts Notification Messages

The Alerts feature can be configured to send an email notification message about a record at a particular date and time as shown in the example below Each message includes a link to the record that generated the alert, information about how long a record has been its current state, when the next alert will be sent, additional information from the alerts settings for the record, and fields from the record:

Hello Developer Two,

Alert for Record 25

To view this record, browse to Product Development Tracker (nrtracker1).

<http://SERVERNAME/nrtracker1/ptlogin.asp?page=view&record=25&formid=1>

As of 11/27/2006 04:15:03 PM the record Status (In Development) is unchanged.

There is no next alert due.

Additional Information:

PRN: 25  
 Title: Add a chart wizard  
 Product: Our Browser  
 Platform: All  
 Reported In Version: 1 . 2 . 1 . None  
 Request Type: Enhancement  
 Severity: 4 (Med Impact - High %)  
 Description:

==== 11/27/2006 03:31:47 PM [UTC-0800] ==== Development Manager ====  
 Add a wizard for creating charts.

Reported By: Development Manager  
 Date Reported: 11/27/2006 03:31:31 PM [UTC-0800]  
 Email Address:  
 Workaround:  
 Status: In Development  
 Assigned To: Developer Two  
 Estimated Size: 0.0  
 Released In Version: None . None . None . None  
 Planned For Version: None . None . None . None  
 Total Time: 0.0  
 Fix Date:  
 Fix Detail:  
 Test Description:  
 Test Date:  
 Priority: None  
 Defer Reason:  
 Close Detail:  
 Close Date:  
 Duplicate Record #: 0

Note: This is an alert notice sent automatically by Product Development Tracker (nrtracker1).

The fields that are included in the message can be customized. Whether a particular field is displayed in the email message is determined by the Field Visibility settings for that field. Field Visibility can be customized for each field in the [Managing Fields](#) section of the Administration page.

## Discussion Notification Messages

The Discussion feature can be configured to send an email notification message to invite a user or group to participate in a discussion for a record or to notify a user that a new post has been added to a discussion. The sample messages below have the subject (name) of the discussion thread, the record number where the thread is located, and a link to the thread:

### Sample 1 - Invitation to participate in a new discussion

Hello Developer Two,

You are invited to the "Specification Review" discussion thread for Record 25.

To read or post messages to this thread, browse to Product Development Tracker (nrtracker1).  
<http://SERVERNAME/nrtracker1/ptlogin.asp?page=thread&record=25&formid=1&threadid=1&messageid=-1>

Note: This email is sent automatically by Product Development Tracker (nrtracker1).  
To change your discussion notification preferences, browse to Product Development Tracker (nrtracker1),  
<http://SERVERNAME/nrtracker1/ptlogin.asp>  
click Preferences, modify Discussion Settings, click OK.

#### Sample 2 - New post to a discussion in which the user is subscribed

Hello Developer Two,

A new message has been posted to the "Specification Review" discussion thread for Record 25.

To read or post messages to this thread, browse to Product Development Tracker (nrtracker1).  
<http://SERVERNAME/nrtracker1/ptlogin.asp?page=thread&record=25&formid=1&threadid=1&messageid=2>

Note: This email is sent automatically by Product Development Tracker (nrtracker1).  
To change your discussion notification preferences, browse to Product Development Tracker (nrtracker1),  
<http://SERVERNAME/nrtracker1/ptlogin.asp>  
click Preferences, modify Discussion Settings, click OK.

 <b>NetResults Tracker</b>	
<b>Outgoing Mail Configuration</b>	<input type="button" value="Help Topics"/> <input type="button" value="←"/> <input type="button" value="→"/>

## Enable Email Notification

Before using the email integration features (email notification triggered by actions performed on a record, alerts, and discussion messages), you must first perform some basic configuration.

The steps for enabling email notification are:

- **Configure Your Mail Server**

The SMTP Mail Server that you plan to use with Tracker needs to be configured to allow **forwarding** or **relaying** from the machine where Tracker is installed. For most mail servers, this can be done by entering the IP Address of the machine where Tracker is installed into the list of machines allowed to relay or forward through the mail server. Check with your mail server administrator to configure this. If the Tracker server is not allowed to relay through your mail server, Tracker will be unable to generate email notification messages.

- **Set the Mail Server Configuration**

Enter the Mail Server information to be used when generating the outgoing email messages.

To reach the Mail Server Configuration options:

1. Login to the [workgroup](#) as Admin (or another user who is a member of the Admin user group)
2. Click on the **Admin** icon
3. Click on the **Email Configuration** button
4. Select the option **Set Mail Server Configuration**, then click on the **Continue** button

**Outgoing Mail: Set Email Server Configuration**

SMTP Email Server	<input type="text" value="127.0.0.1"/>	 For best performance, 127.0.0.1 is recommended.
Reply-To Email Account	<input "netresults="" &lt;nrt@ourcompany.com&gt;"="" tracker"="" type="text" value='"NetResults Tracker" &lt;nrt@ourcompany.com&gt;"/&gt;&lt;/td&gt; &lt;td&gt;&lt;/td&gt; &lt;/tr&gt; &lt;tr&gt; &lt;td&gt;From Email Account&lt;/td&gt; &lt;td&gt;&lt;input type="text" value='/>	
Email Header Encoding	<input type="text" value="Auto Select"/>	
Multi Part Email	<input type="text" value="Text Only"/>	
Authentication	<input type="text" value="Anonymous"/>	

5. Enter the name of the mail server you would like to use in the **SMTP Mail Server** field. You can enter the name of the mail server as a host name (e.g. *smtp.mydomain.com*) or as an IP address (e.g. *192.168.22.118*). For best performance, it is recommended that you use a mail server located on the same machine as Tracker and reference it by IP address by entering **127.0.0.1** (a special IP address which is interpreted by the IP protocol to mean the local machine and does not require a host name lookup). If you do not have a mail server installed on the same (web server) machine as Tracker, we recommend installing the Microsoft SMTP Service (which is included with Internet Information Services on Windows Server operating systems). Then, configure it to forward email to your main mail server for distribution to the recipients. By having a local mail server (dedicated to Tracker), you may significantly speed up Tracker operations which send email notifications (Add, Edit, Task, and Delete). Detailed steps for configuring the Microsoft SMTP service on Windows 2000 and setting up a smart host to route to your main mail server can be found in the following Knowledge Base article:

<http://kb.nrtracker.com/Item.asp?id=237#smtp>

**NOTE:** Please ensure that the mail server you enter for this option is set such that it allows the IP address of the machine where Tracker is installed to forward or "relay" messages through your mail server. Most mail servers are set to not to allow such forwarding or relaying by default to prevent forwarding of spam. This is especially important if your mail server is on a separate machine from Tracker.

6. In the **Reply-To Email Account**, enter the email address (e.g. *admin@mycompany.com*) that should be used when users attempt to reply to an email message generated by Tracker (or when a destination mail server rejects an email for some reason and sends a delivery failure notification).

If you wish to include a name with the email address, enter the information in the form "**Name** <email address>" (with a space between " and <) as shown in the example above. The double quotes around the name are required unless there is no blank space in the name. The less than and greater than symbols are required around the email address. If you include a name and the double quotes and less than/greater than symbols are not used, Tracker may not be able to send the email or you users may not be able to receive it. Without a valid email address entered into this field, Tracker will be unable to send email notification messages. It may also be a good idea to tell your users to make sure that their spam filters allow all email from this address (put it on their "white list").

7. In the **From Email Account**, enter the email address (e.g. admin@mycompany.com) that should appear in the **From** field of the email message sent by Tracker. If you wish to include a name with the email address, enter the information in the form "**Name** <email address>" (with a space between " and <) as shown in the example above. The double quotes around the name are required unless there is no blank space in the name. The less than and greater than symbols are required around the email address. If you include a name and the double quotes and less than/greater than symbols are not used, Tracker may not be able to send the email or you users may not be able to receive it. Without a valid email address entered into this field, Tracker will be unable to send email notification messages. It may also be a good idea to tell your users to make sure that their spam filters allow all email from this address (put it on their "white list").
8. Select the type of **Email Header Encoding** you would like to use in the pulldown menu. The encoding that you choose for this option should be based on the characters that will be used in this workgroup. In general, email headers must contain only US-ASCII characters. Headers that contain non US-ASCII characters must be encoded so that they contain only US-ASCII characters. This process involves using either "**B**" (**BASE64**) or "**Q**" (**Quoted-Printable**) to encode certain characters. The "Q" encoding is recommended for use when most of the characters to be encoded are in the ASCII character set; otherwise, the "B" encoding should be used. If you are not sure what type of encoding is compatible with your mail server, choose **Auto Select** for this option.
9. Choose a format for the email content in the **Multi Part Email** pulldown menu. This option determines whether the email messages generated by Tracker will contain only **Text** or **Text and HTML**. For example, if the character set for your workgroup is UTF-8, email from Tracker may also contain UTF-8 characters. If your email client cannot display UTF-8 characters, selecting Text and HTML for this option might help. If your email client can display HTML format, the UTF-8 characters in the email message can be displayed correctly.
10. Select the type of **Authentication** that should be used when generating email notification messages. By default, **Anonymous** authentication is selected. Anonymous authentication will generate email messages using Tracker's anonymous user account, PUSR4<hostname>, as the effective user. This anonymous user account is configured automatically by the installation setup program.

If you wish to use **Basic** authentication, an **Authentication User Name** and **Authentication Password** need to be provided in the corresponding fields. This user account will be used to authenticate Tracker's request to the mail server when generating email messages.

11. Click on the **OK** button to save your Mail Server Configuration settings

- **Set the Global Email Options**

The Global Email Options section allows you to choose whether the contents of Text and TextArea fields should be truncated when displayed in the email messages generated by Tracker.

To reach the Global Email Options section:

1. Login to the [workgroup](#) as Admin (or another user who is a member of the Admin user group)
2. Click on the **Admin** icon
3. Click on the **Email Configuration** button
4. Select the option **Set Global Email Options**, then click on the **Continue** button
5. Select **No** if you wish to display the entire contents of the Text and TextArea fields when they are configured to be [included in the email notification messages](#). Selecting **Yes** for this option will truncate the Text fields to 55 characters and the TextArea) fields to 250 characters when displayed in email notification messages.
6. Click on the **OK** button to save your selection

- **Configure Email Content and Rules**

The content included in an email notification message is determined by several different components:

- **Email Common Content**  
Email Common Content is information included in the body of email notification messages (Greeting, Introduction and Signature) based on the form used to submit a record. Email Common Content is configured in the [Managing Workflows](#) section.
- **Email Rules**  
Email Rules determine when and to whom email notification messages will be sent. Email Rules are configured per workflow in the [Managing Workflows](#) section.
- **Email User Group Privileges** There are a set of user group privileges which determine which pieces of email content users receive based on their user group membership. Email user group privileges are configured in the [User Administration - Privileges](#) section.

- **Enable and Configure Alerts (Enterprise Edition Only)**

Information for enabling and configuring the Alerts feature can be found in the [Alerts](#) section.

- **Discussion (Enterprise Edition Only)**

Information on enabling and configuring the Discussion feature can be found in the [Discussion](#) section.

## Disable Email Notification

If at any time you wish to turn off all email notification, remove the information from the **SMTP Email Server** setting in the [Mail Server Configuration section](#) mentioned above.

Incoming Mail settings are used for the Submit via Email feature. The Incoming Mail settings will not be displayed in the Email Configuration page of the Administration section unless an Email License Key has been entered into the [Tracker License Manager](#) and the "Enable Submit via Email" option is set to "Yes" in [General Preferences](#).

To configure the Incoming Mail settings,

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Email Configuration** button
4. Select **Set Global Email Options** in the **Incoming Mail** section
5. Click on the **Continue** button
6. Set the Global Mail Options as desired. The following options are available:

#### **Send Mail Processing Status (as Email) to User**

Select a user who will receive email messages about the processing status of incoming mail for this workgroup. By default, this is set to Admin. Any user that is added to the workgroup and has a valid email address entered into the [user profile information](#) can be selected. Select <None> if you do not wish to send any status email messages.

#### **Send Mail Processing Status (as Email) on**

Select the condition which will send an email message about the processing status of incoming mail for this workgroup. By default, this is set to "Success and Failure", which will generate an email message every time Tracker checks for email (even if there is no email to process). **Warning: Since this setting will generate a status email every time Tracker checks for email, we strongly recommend changing this setting (to Failure or None) once incoming email configuration is complete and connectivity to your mail server has been verified.** Selecting "Failure" will generate an email message only when Tracker gets an error attempting to check for email (e.g. can not connect to the mail server) or gets an error while attempting to convert an incoming message to a new record. Selecting <None> indicates that no email messages should be sent regardless of the processing status of each incoming message. These email messages will be sent to the user specified in the option "Send Mail Processing Status (as Email) to User".

7. Click **OK** to save the changes

## Sending An Administrative Email

Help Topics

&lt;&lt;

&gt;&gt;

You can send an email with any message you would like to a user or user group from within Tracker. You may wish to do this while performing administrative tasks to notify users affected by any changes. Or, you may use this facility to troubleshoot problems receiving email messages.

To **send an email** to a user or a user group, follow these steps:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Send Email** button
4. Select a user or user group (user groups are listed as [User Group]) from the pulldown labeled **To**;
5. Enter a message subject in the **Subject**: field, and a message in the **Body**.
6. Click on the **OK** button to send the email and return to the Tracker Administration section.

## Send Email

Send

Cancel

To

Admin

Subject

test

This is a test message.

Message  
Text

Send

Cancel

## Overview

Tracker incorporates a security model that allows the administrator to control access to both function (Add, Delete, Edit, etc.) and data.

By using these features the administrator can create different classes of users (via user groups) with different available operations and access to data. For example, a user group could be defined that allows users access to query and view only those records created by other users in their group.

Note that this section is meant to serve as an introduction to basic Tracker security concepts. Detailed information on how to perform specific tasks are covered in the various help subjects where the options are actually set.

---

## User Groups and Logins

The Tracker security model is based on the concept of individual users and user groups. Each individual user must log into the system, and each user is a member of one or more user groups. User groups are a convenient way to group similar users together, and define security for those users.

For example, rather than defining specific access privileges for all 50 users at a company, the administrator can split the users in to functional groups (Development, QA, Customers, etc.), define security for the functional groups, and then assign the users to those groups.

All users are members of one of the following system-defined user groups by default:

- **Users:** All users with Static or Floating selected as the [License Type](#) are a member of the "Users" group.
- **Restricted Users:** All users with Restricted selected as the [License Type](#) are a member of the "Restricted Users" group.

The Admin user is always a member of the system-defined user group "Admin".

Users and user groups are covered in detailed in these help topics:

- [User Administration - Users](#)
- [User Administration - Groups](#)

## Restricting Access To Functions

Each user group can be assigned privileges, and each user that is a member of the group inherits that set of privileges. All of the basic Tracker functions like Add, Edit, etc. are defined to be individual privileges that can be assigned to a user group.

For example, to allow a user to Add and View records, create a user group that has both Add and View privileges, and then assign the user to that group.

One special case is the Admin group, which always has Admin function privilege. Other user groups can also be defined to have this privilege, however it cannot be removed from the Admin group. Privileges are covered in detail in the following section:

- [User Administration - Privileges](#)
- 

## Restricting Access to Projects and Forms

Tracker allows multiple projects to be created and maintained in a workgroup. Each project can be defined to be visible to only certain user groups. Only users who are members of those user groups with visibility to a project can add or access records that belong to that project. Users cannot login to Tracker unless they are a member of a user group that has visibility to at least one project.

Each Project has one or more Forms (record types). Within each Project, visibility can be independently specified for each Form. So even within a single Project, some user groups may have access to multiple Forms while others will only have access to one Form.

Project and Form Visibility is explained in the following section:

- [Managing Projects](#)
- 

## Restricting Access to Records by Reporter

If you have purchased Restricted user licenses, user accounts with those licenses will automatically have their access limited to those records which they submitted. More specifically, their access is limited based on the setting of the Reporter field within the record. Users with sufficient privilege can set/modify the Reporter field to submit issues on a Restricted user's behalf. All reports which a Restricted user runs are automatically filtered to only display issues which they submitted (or were submitted on their behalf).

User license types are explained in the following section of the Installation Guide:

- [User License Types](#)
-

## Restricting Access To Records

Tracker supports an optional record visibility model. This means that each individual record is defined to be visible to a set of user groups. The record can be seen by any user who is a member of a group in this set, it is invisible to all other users. This feature can be enabled or disabled via the Record Visibility setting under [General Preferences](#).

**Record Visibility should only be enabled by advanced Tracker administrators.** In most cases, Project Visibility, Form Visibility, or Restrictor User accounts can be used to configure and manage visibility. Record visibility is a record-by-record setting of visibility that is rarely needed. In most cases, it is more difficult to configure and maintain (each record may have different visibility settings) than the other visibility options. It is typically only necessary in situations where you must configure visibility on a case-by-case basis. This might be done by the person who submits the issue or by someone later on in the workflow. For assistance in choosing between the visibility options, contact Technical Support. They can review your requirements and provide suggestions regarding which option (or combination of options) may be best for you.

By default, when a record is created, it is set such that it is visible to all groups in which the reporter is a member. You can assign a user group the ability to modify record visibility. All users with this privilege are given the ability to explicitly pick the user groups to which the record is visible when it is created, and also the ability to later edit the visibility. There are two options that control this behavior (see [General Preferences](#) for details...):

- **Limit Record Visibility Selection To A User's Own Groups**

When enabled, a user may only choose from the groups in which he or she is a member when setting record visibility.

- **By Default Include Group "Users" For Record Visibility On Add Operations**

Since all non-Restricted users are members of the Users group, it is impossible to restrict access to a record if it is made visible to the Users group. This setting allows you to specify that the record should not be made visible to the Users group when it is first created. If you have enabled the Record Visibility feature, this option should be set to "No".

If you have a set of users who should be able to access all records, irrespective of which user groups they belong to, you should give those users the **Override Record Visibility** privilege. This can be useful for situations where internal users should be able to see all records, but external users should be limited to viewing only records they have added or records which have been explicitly made visible to them. You can configure the system to do this by giving **Override Record Visibility** to internal user groups (and excluding it from the Users user group) and by removing **Edit Record Visibility** privilege from all external user groups (and the Users user group). When this is done in a system where Record Visibility is enabled, **Limit Record Visibility Selection to A User's Own Groups** is set to "Yes", and **By Default Include Group "Users" for Record Visibility On Add Operations** is set to "No", external users will only be able to see records they (or others in their group(s)) have added and internal users will be able to see all records. See [User Administration - Privileges](#) and [General Preferences](#) for details on how to modify these settings.

 <b>NetResults Tracker</b>	
<b>Users</b>	Help Topics    <<    >>

## Overview

In order to use Tracker, every user must log in as a registered user. Tracker allows you to enter users and distinguish between internal users and external users like customers or partners. Before a user can begin using Tracker, a user must be created and given access to a workgroup(s) in the [User Management System \(UMS\)](#). After this is done, you can add a user to the User Administration section of your Tracker workgroup. If the UMS Administrator has given you the [UMS privileges](#) to do so, you can add, edit and delete user accounts from the User Administration section. Within a workgroup, a user's access rights and privileges are determined by the user groups to which the user belongs.

## Definition of Users by License Type

There are three types of licenses available for use with Tracker: Static, Floating, and Restricted.

For all licenses only one user may be logged in to Tracker per license. A **static** license is defined as one user account (User ID) for each license purchased. Only one user can login to the system with this particular User ID. A **floating** license is defined as up to 10 user accounts for each license purchased. Only one user per floating license can login to the system at a particular time. Others who try will be denied access until a floating license user logs off (clicks the Logoff icon). A **restricted** license is defined as one user account (User ID) for each license purchased.

**Static** licenses are typically used for users who regularly use Tracker and therefore must be guaranteed access at any time (can never be denied access because too many users are already logged in). **Floating** licenses are typically used for infrequent users if it is acceptable that they may not be able to login to the system some of the time (as all floating licenses may be in use). **Restricted** licenses are typically used for external users (e.g. customers, vendors, partners) that should have limited access to Tracker operations and data.

Users of static and floating licenses are often referred to as "non-Restricted" users (users that do not use a Restricted license) in the various Help Guides.

For more details on licensing including your License Agreement and the number and type of license(s) you have, please run the [License Manager](#).

## System Defined Users

Tracker has 3 pre-defined users. These users all serve a special purpose and are not counted towards the number of users you have licensed. You cannot remove or modify these users:

- **Admin**  
The Tracker administrator user. Admin is always a member of the Admin group. The initial Admin password is "Admin". It is recommended that you [change this password](#) the first time you login.
- **TBD**  
TBD is used to allow users to specify no choice. This user can be used as a placeholder for records where the assignee has not yet been decided or in cases where a record has been processed and an assignee is no longer needed. You cannot login as TBD.
- **Unregistered User (Inet)**  
Unregistered User (Inet) is used by the [Submit via Web for Unregistered Users](#) and [Submit via Email](#) features. When issues are added using the Submit via Web for Unregistered Users feature (the Submit Page), the Reporter field is set to Unregistered User (Inet). It is also used as the Reporter for issues added using Submit via Email when Tracker can not find a matching user account (one whose email matches the From: address in the email). You cannot login as Inet.

## User Administration

OK

Add User

Manage Groups

Options	Company	User ID	Name	Email	Phone	Has Workgroup Access	License Type
<a href="#">Edit</a> <a href="#">Groups</a>		Admin	Admin			Not Applicable	Not Applicable
Options	Company	User ID	Name	Email	Phone	Has Workgroup Access	License Type
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Company A	res_one	Restricted One	res_one@companya.com		Yes	Restricted
Options	Company	User ID	Name	Email	Phone	Has Workgroup Access	License Type
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Company B	res_two	Restricted Two	res_two@companyb.com		Yes	Restricted
Options	Company	User ID	Name	Email	Phone	Has Workgroup Access	License Type
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	bld_mgr	Build Manager	bld_mgr@ourcompany.com		Yes	Static
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	dev_one	Developer One	dev_one@ourcompany.com		Yes	Static
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	dev_mgr	Development Manager	dev_mgr@ourcompany.com		Yes	Static
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	process_mgr	Process Manager	process_mgr@ourcompany.com		Yes	Static
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	qa_mgr	QA Manager	qa_mgr@ourcompany.com		Yes	Static
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Groups</a>	Our Company, Inc.	qa_one	QA One	qa_one@ourcompany.com		Yes	Static
Options	Company	User ID	Name	Email	Phone	Has Workgroup Access	License Type
		TBD	TBD			Not Applicable	Not Applicable
		Inet	Unregistered User			Not Applicable	Not Applicable

OK

Add User

Manage Groups

The list on the User Administration page provides information such as Company Name, User ID, Name, Email Address and Phone Number. Workgroup Access lists whether the user account has access to the workgroup (whether a user has access to a workgroup is controlled in the [User Management System](#)). [License Type](#) shows what type of license (if any) is associated with the user account. The users are grouped by Company Name (with a separate section for the built-in users that cannot be used to login: TBD and Inet).

If there are more than 50 users in a workgroup, the list of users will be broken up into pages. Click on the page pulldown to select a page or click on the Previous or Next arrows to move to another page.

### Adding a User

To add a user:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Add User** button
5. Depending on the [User Management System \(UMS\) privileges](#) granted to you by the UMS Administrator, you will either see:
  - a. The **Add New User Account** page which has a list of fields to fill out to create a new user account and an **Add Existing Users** button to add user accounts that have been previously created to the workgroup. If you want to add an existing user account to the workgroup, review the [Add Users to Workgroup](#) section. If you want to create a new user account, review the [User Profile Information](#) list for details on filling out the fields to create a new user account. After filling out the fields, click on the **Add New User** button. A confirmation page will be displayed. Click **OK** to return to the User Administration section or click on the **Add Another User** button to create another user account. Note: If the User ID you entered in the Add New User Account page matches a user account that was previously added and subsequently deleted, you will be prompted to choose whether to restore the user by clicking on the **Restore User** button or enter a different User ID on the Add New User Account page by clicking on the **Back** button.

### Add New User Account

User ID	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
License Type	Static <input type="button" value="v"/>
Company	<input type="text"/>
Email	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State / Province	<input type="text"/>
Zip / Pincode	<input type="text"/>
Country	<input type="text"/>
Comment	<input type="text"/>

**OR**

- b. The **Add Users to Workgroup** page which displays a list of available users that can be added to the workgroup. Click on the User ID of the user you wish to add, then click on the **Add** button. You can select multiple users to be added by holding down the **CTRL** button on your keyboard while clicking on the User IDs you wish to select. Click **OK** after the operation is complete.

A user will only appear on the list of available users if the user account has been created and given access to the workgroup via the [User Management System](#).

Users that appear on the list of Available Users preceded by "\*" are users that were previously deleted from the User Administration section. These users can be restored by clicking on the user, then clicking on the **Add** button. Review the [Restoring a User](#) section for more information about restoring a user.

**Add Users to Workgroup**

**Note:** Any user with prefix \* has been previously deleted from the workgroup. Selecting this user, then clicking on the Add button will restore the user.

**Available Users to Add**

pubs\_mgr (Publications Manager / Static)  
pubs\_one (Publications One / Static)

## User Profile Information

The following information can be entered when creating a user account. The fields User ID, Password, Confirm Password and First Name are required. Though it is not a required field, it is recommended that you also enter an email address for the new user account so the user can receive email notifications from Tracker.

### User ID

Unique identifier for user. May be up to 40 characters long.

### Password

Login password for user. May be up to 10 characters long.

The password field is not displayed in a workgroup(s) with [Active Directory Integration](#) enabled because the user's Windows user account information will be used for authentication.

### Confirm Password

Confirm the login password for user as entered in the Password field above.

The password field is not displayed in a workgroup(s) with [Active Directory Integration](#) enabled because the user's Windows user account information will be used for authentication.

### Last Name

User's last name

### First Name

User's first name

### License Type

Can be Static, Floating, or Restricted. See [Definition of Users by License Type](#) for further information. Users with **Static** or **Floating** selected as the License Type are also referred to as **Unrestricted** or **Non-Restricted** users in various areas of the Help Guides.

### Company

User's company name

### Email

## Users

Email address of the user. Used by Tracker for email notification of events.

### Phone

User's phone number

### Fax

User's fax number

### Address 1

First line of user's address

### Address 2

Second line of user's address

### City

User's city

### State/Province

User's state or province

### Zip/Pincode

User's zip code or pincode

### Country

User's country

### Comment

Any other information about the user to be included in his or her profile information

## Deleting a User

To delete a user from a workgroup:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Delete** button to the left of the user account you wish to remove.

Deleting a user will not affect your existing records. However, before deleting a user it is recommended that you reassign any records currently assigned to that user to TBD or some other user in the system. You can search for all records assigned to the user by using the Query function. And, you can use the [Edit Results operation](#) from the query results page to reassign all records at once, rather than individually editing each record.

If you attempt to delete a user who is still the assignee for records within your database, you will be prompted to select a new assignee for the records from a list of internal non-Restricted users in the system. Similarly, if you attempt to delete a user who is a state manager, you will be prompted to select a new state manager from a list of internal non-Restricted users in the system. If you attempt to delete a user who is selected to receive alert email notifications, is specified as criteria in any saved queries or charts, or is specified in any transitions, you will be prompted to either select a replacement user from a list of internal non-Restricted users in the system or delete the relevant alert settings, queries, charts and transitions.

## Restoring a User

If a user account is still listed in the "Available Users" list (indicating it is still active in the User Management System and is granted access to the workgroup), you can restore a previously deleted user with the steps below. If you choose to restore the user, the settings in the user's [preferences](#) will be preserved as they were at the time the user was deleted from the workgroup's User Administration section. A restored user which has Static or Floating selected as the license type will be only be added as a member of the Users group. A restored user which has Restricted selected as the license type will only be added as a member of the RestrictedUsers group. A user must manually be added to any other user groups after being restored.

To restore a user account:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Add User** button
5. Depending on the [User Management System \(UMS\) privileges](#) granted to you by the UMS Administrator, you will either see the **Add New User Account** form or the **Add Users to Workgroup** page. If you the Add New User Account form is displayed, click on the **Add Existing Users** button to continue restoring a user account.
6. Users who were previously deleted from the User Administration section will be denoted by a "\*" in front of the User ID on the Available Users list. Click on the user account, then click on the **Add** button.

7. You will be prompted that the user account you selected had been previously deleted. Click **OK** to restore the user account or click **Cancel** to abort the operation.

## Editing a User

The user accounts you can edit in the User Administration section depend on the [User Management System \(UMS\) privileges](#) granted to you by the UMS Administrator. You may only be able to edit the profile information for only the Admin account or only users that have access to a single workgroup or any user.

To edit a user account:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Edit** button to the left of the user account to be modified
5. Click **OK** to save the changes to this account

Please note: It is not possible to edit a user account containing UTF-8 characters from the User Administration section of a workgroup that is not configured to support UTF-8 characters. Check the Character Set option in [General Preferences](#) to see if your workgroup is configured to support UTF-8 characters. If the Character Set option is set to "UTF-8", the workgroup can support UTF-8 characters. If something other than UTF-8 is listed as the character set, the workgroup cannot support UTF-8 characters and you cannot edit the user profile information for any account containing UTF-8 characters via the User Administration section.

## Assigning User Groups

To add or remove a user to/from user groups:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Groups** button to the left of the user account
5. To add the user to a group, click on the desired group in the **Not Member Of** column, then click on the **Add** button. To remove the user from a group, click on the desired group in the **Member Of** column, then click on the **Remove** button.

If there are any saved queries or charts created for the user group being removed (or created by the user being modified) and the saved queries/charts only have one project and form selected, you will be prompted to either edit (to select another project/form) or delete these saved queries or charts before you are able to remove the user group. Information on editing or deleting saved queries can be found in the [Using Saved Queries and Reports](#) Help section.

Information on editing or deleting saved charts can be found in the [Metrics](#) section.

6. Click **OK** to return to the User Administration section.

As an alternative, you can assign multiple users to a group using the instructions in the [User Administration - Groups](#) section.

Assign User Groups For User: process\_mgr (Static)

OK

Member Of ( 2 )

- Managers (Standard)
- Users (Standard)

Not Member Of ( 4 )

- Admins (Standard)
- Developers (Standard)
- QA (Standard)
- RestrictedUsers (Restricted)

Remove »

« Add

OK

## Overview

A user group is a collection of zero or more users. Each group is assigned rights and privileges to the system, and all members of the group inherit those rights and privileges. For example, any user that is a member of the Admins group inherits the ability to access the Admin features of Tracker.

You can assign each user to one or more user groups, and the privileges of each user is the sum of all the privileges for all of the groups in which he or she is a member. There are some restrictions:

- All [non-Restricted](#) users are a member of the Users group
- All [Restricted](#) users are a member of the RestrictedUsers group
- The Admin user is always a member of the Admins group

## User Group Administration

OK

Add Group

Options	Group Name	Type	# of Members	Comment
<a href="#">Edit</a> <a href="#">Users</a>	Admins	Standard	1	The Admin user is always a member of this group.
<a href="#">Edit</a> <a href="#">Users</a> <a href="#">Delete</a>	Developers	Standard	1	Development Group
<a href="#">Edit</a> <a href="#">Users</a> <a href="#">Delete</a>	Managers	Standard	4	All managers are members of this group
<a href="#">Edit</a> <a href="#">Users</a> <a href="#">Delete</a>	QA	Standard	1	QA Engineers
<a href="#">Edit</a> <a href="#">Users</a>	RestrictedUsers	Restricted	0	All Restricted license type users are members of this group.
<a href="#">Edit</a>	Users	Standard	10	All Static and Floating license type users are members of this group.

OK

Add Group

## Adding a User Group

To add a new user group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Manage Groups** button
5. Click on the **Add Group** button
6. Enter a name for the user group in the **Group ID** field
7. Enter some information to describe the purpose of the user group in the **Description** field
8. In the pulldown, select the **Type** of user group you are creating.
  - Select **Standard** if the members of this user group will be Static or Floating users. Restricted users cannot be members of a Standard user group
  - Select **Restricted** if the members of this user group will be Restricted users. Non-Restricted users can be members of either Standard or Restricted user groups
9. Click on the **Add Group** button
10. To enable a privilege for the user group you are creating, check the box next to the privilege. Details of the privileges available for each type of user group can be found in the following sections:
  - [Privileges for Standard User Groups](#)
  - [Privileges for Restricted User Groups](#)

11. After enabling all of the desired privileges, click on the **OK** button to save the user group
12. Click **OK** to return to the User Group section or click on the **Add Another Group** button to create another user group

## Editing a User Group

To edit a user group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Manage Groups** button
5. Click on the **Edit** to the left of the user group you wish to modify
6. You can update the group name, description, or privileges. The "Type" property for each group cannot be edited. Click **OK** to save your changes.

## Deleting a User Group

To delete a user group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Manage Groups** button
5. Click on the **Delete** button
6. Click **OK** to confirm the operation. If there are any saved queries or charts created for the user group being removed and the saved queries/charts only have one project and form selected, you will be prompted to either edit (to select another project/form) or delete these saved queries or charts before you are able to delete the user group. Information on editing or deleting saved queries can be found in the [Using Saved Queries and Reports](#) Help section. Information on editing or deleting saved charts can be found in the [Metrics](#) section.

If there are any [email rules](#) where this user group is selected as a recipient, you will be prompted to either choose a user group to replace the user group being deleted or remove the user group from the email rules.

If there are any [transitions](#) where this user group is selected in the properties, you will be prompted to either select a user group to replace the one being deleted or delete the transitions.

If there are any [alerts settings](#) where this user group is selected as a recipient or in the "Show Alerts during Add/ Task" privilege list, you will be prompted to choose a user group to replace the user group being deleted or delete the alert settings.

7. Click **OK** to proceed. Click **OK** on the confirmation page.

## Assigning Users to a User Group

To assign users to a user group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Administration** button
4. Click on the **Edit Groups** button
5. Click on the **Users** button
6. To add a user as a member of the user group, click on the User ID in the **Not Members** column, then click on the **Add** button. To remove a user as a member of the user group, click on the User ID in the **Members** column, then click on the **Remove** button. To select multiple users, hold down the **CTRL** button on your keyboard while clicking on the desired users. If there are any saved queries or charts created for the user being removed (or created for the user group being modified) and the saved queries/charts only have one project and form selected, you will be prompted to either edit (to select another project/form) or delete these saved queries or charts before you are able to remove the user from the user group. Information on editing or deleting saved queries can be found in the [Using Saved Queries and Reports](#) Help section. Information on editing or deleting saved charts can be found in the [Metrics](#) section.

For a Standard user group, only non-Restricted users will be listed in the Not Members column as available users to be added to the user group. For a Restricted user group, Restricted and non-Restricted users will be listed in the Not Members column to be added to the user group.

### Assign Users For (Standard) User Group: Managers

OK

#### Members ( 4 )

bld\_mgr (Build Manager / Static)  
dev\_mgr (Development Manager / Static)  
process\_mgr (Process Manager / Static)  
qa\_mgr (QA Manager / Static)

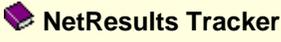
#### Not Members ( 3 )

Admin (Admin / Static)  
dev\_one (Developer One / Static)  
qa\_one (QA One / Static)

Remove »

« Add

OK

				
<b>Privileges</b>	<table border="1"> <tr> <td>Help Topics</td> <td>&lt;&lt;</td> <td>&gt;&gt;</td> </tr> </table>	Help Topics	<<	>>
Help Topics	<<	>>		

The following describes the privileges that may be assigned to Standard and Restricted user groups. To set the privileges for a user group:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon in the button bar
3. Click on the **User Administration** button
4. Click on the **Edit Groups** button
5. Click on the **Edit** button to the left of the user group for which the privileges will be modified
6. To grant a privilege to a user group, check the box to the left of the privilege. To deny a privilege, uncheck the box. Details of the available privileges for each user group type can be found below.
7. Click **OK** to save your changes

When assigning user group privileges, please note:

1. All non-Restricted users are members of the **Users** group. Therefore, if a privilege is granted to the Users group, all non-Restricted users will have the privilege. When a new non-Restricted user is added to the workgroup, this user inherits the privileges granted to the Users group. It is best to limit the privileges assigned to the Users group to be a minimal set of privileges, then create new user groups that provide additional privileges.
2. All Restricted users are members of the **RestrictedUsers** group. If a privilege is granted to the RestrictedUsers group, all Restricted users will have the privilege. When a new Restricted user is added to the workgroup, this user inherits the privileges granted to the RestrictedUsers group. It is best to limit the privileges assigned to the RestrictedUsers group to be a minimal set of privileges, then create new user groups that provide additional privileges.
3. Users can be members of one or more user groups, so the operations a user can perform are based on the privileges assigned to all of the user groups in which the user is a member.
4. Non-global privileges (privileges that are not marked with "\*" are privileges that are applied per Project and Form. In other words, the set of privileges a user inherits from being a member of a particular user group determine what actions the user can perform for the Projects and Forms that are visible to that user group. Refer to the [Form Visibility](#) section to see what user groups have visibility to a combination of Project and Form.

For example, let's say a workgroup has 2 forms: a Product Development form for submitting issues to the Product Development Process and a Support form for submitting tickets through the Support Ticket Process. User One is a member of the user groups "Developers" and "Support". The Developers group has visibility to the Product Development form and has the privileges "View Fields" and "Task Assigned Records" enabled. The Support group has visibility to the Support form and has the privileges "Add", "View Fields" and "Task Assigned Records" enabled. Even though User One is a member of a user group with the "Add" privilege enabled, User One can only add issues using the Support form (and not the Product Development form).

Report privileges (Query and Metrics) are non-global by default. An example to illustrate what this means: let's say a user is a member of the Developers and Managers user groups. The Developers group has the "Query" privilege as the only privilege enabled in the Query section. The Managers group has all of the privileges enabled in the Query section. In the Saved Queries pulldown, if there is a saved query with "[Developers]" at the end of the name (a group saved query for the Developers group), the user will only be able to use the operations "Run" or "Set as Default" for this saved query because the Developers group does not have "Save Group Queries" privilege enabled. If there is a saved query with "[Managers]" at the end of the name (a group saved query for the Managers group), the user will be able to use any operations ("Run", "Preview", "Edit", etc.). The behavior for group saved report layouts, group saved charts and group saved chart layouts is similar to the above.

The option "Make All Report Privileges Global" is available in the [General Preferences](#) section if you wish to make report privileges global (such that they are applied to users that are members of a user group irrespective of the Projects and Forms visible to the user group).

5. Privileges marked with "\*" in the privileges list below are global privileges. This indicates that the privilege is applied to users that are members of a user group irrespective of the Projects and Forms visible to the user group. In other words, a user that inherits a global privilege from one user group can make use of the privilege anywhere in Tracker.

## Privileges for Standard User Groups

OK

Cancel

Group ID Developers

Description Development Group

**General Privileges**

- Toolbar Help \*
- Context-Sensitive Help \*
- History
- Delete
- Admin \*
- Edit Own User Account \*

**Add Privileges**

- Add
- Add Attachments via Add Page
- Can Be Assignee For Add

**View Privileges**

- View Fields
- View Attachments
- View Source Code List
- View Record History
- View User Information

**Task Privileges**

- Task Assigned Records
- Task Records in State(s):
  - Pending Dev Review
  - In Dev Review
  - Pending Pubs Review
  - In Pubs Review
- Task All Records

**Edit Privileges**

- Edit Fields
- Edit Attachments
- Edit Source Code List
- Can Be Assignee For Edit

**Query Privileges**

- Query
- Save Group Queries
- Save Group Report Layouts
- Edit Query Result Set

**Metrics Privileges**

- Home Page Only
- Metrics
- Save Group Charts
- Save Group Chart Layouts

**Record Visibility Privileges**

- Edit Record Visibility
- Override Record Visibility \*

**Edit Visibility Privileges**

- Edit Assigned Records
- Edit Records in State(s):
  - Pending Dev Review
  - In Dev Review
  - Pending Pubs Review
  - In Pubs Review
- Edit if State Manager
- Edit if Reporter in State(s):
  - Pending Dev Review
  - In Dev Review
  - Pending Pubs Review
  - In Pubs Review
- Edit All Records

**Email Content Privileges**

- Greeting
- Introduction
- Operation Description
- Link
- History Comment
- Fields
- Signature

**Clone Privileges**

- View Clone Information
- Clone Record

**Alert Privileges**

- View Alert Settings
- Edit Own Alert Settings
- Edit Alert Settings

**Discussion Privileges**

- View Messages
- Post Messages
- Initiate Discussion Threads
- Edit Messages
- Delete Messages and Threads

Standard user groups (all members are non-Restricted users) can be granted or denied the following privileges.

**General Privileges**

The following privileges are basic Tracker operations. An icon will appear in the top button bar for members of the user groups which have been granted one or more of the following general privileges:

** Toolbar Help\***

Members of groups with this privilege are allowed to access the help documentation by clicking on the Help icon in the Button bar. Clicking on the Help icon will open a browser window to display either the default Tracker Help guide page or the URL entered for the [Custom Help Link for Standard Users](#) option in the [General Preferences](#) section.

**Context-Sensitive Help Link\***

Members of groups with this privilege are allowed to access the help documentation by clicking on the context-sensitive "Help" links that appear in the upper right corner of each page in Tracker. Clicking on the "Help" link will open a browser window displaying the specific Help section which describes the page where the link was clicked.

**History**

Members of groups with this privilege are allowed to make queries into the record history database (audit trail documenting changes made by whom and when)

**Delete**

Members of groups with this privilege are allowed to delete records

**Admin\***

Members of groups with this privilege allowed to perform Admin functions

**Edit Own User Account\***

Members of groups with this privilege are allowed to make changes to the contact information listed in their user account. Users with this privilege can click on the [Account Info](#) link in the upper right corner of the Home Page to edit the information in their user profile

**Add Privileges**

The following privileges are related to the Add operation. The members of the user group(s) that are granted any of the privileges below will have the **Add** icon displayed in the button bar:

**Add**

Members of groups with this privilege are allowed to add records

**Add Attachments via Add Page**

All members of groups with this privilege are allowed to add an Attachment on the Add page (along with the original problem record). To subsequently modify attachments in a record (Edit, Delete, or Add additional attachments), a user must also be a member of a group with the Edit Attachments privilege.

**Can Be Assignee For Add**

All members of groups with this privilege appear in the Assignee list when a record is added. This allows you to limit which users can be assigned to a newly added record.

**View Privileges**

The following privileges are related to the View operation. The members of the user group(s) that are granted any of the privileges below will have the **View** icon displayed in the button bar and in the reports displayed on the Home and Query pages:

**View Fields**

Members of groups with this privilege are allowed to view the fields within records. The fields which the members or groups are allowed to view are based on the [Field Visibility](#) settings on the View page for each user group.

**View Attachments**

Members of groups with this privilege are allowed to view attachments within records

**View Source Code List**

Members of groups with this privilege are allowed to view source code files associated with records when [Source Code Control Integration](#) is enabled

**View Record History**

Members of groups with this privilege are allowed to view record history (audit trail documenting changes made by whom and when)

**View User Information**

When the "Assigned To" or "Reported By" fields appear on the View Page or in reports on the Home or Query pages, all members of groups with this privilege will be able to click on the user's name to see the details in their user account (e.g. phone number, email address, company name).

**Task Privileges**

The members of the user group(s) that are granted any of the privilege below will have the **Task** icon displayed in the button bar and in the Action column of the reports displayed on the Home and Query pages.

### Task Assigned Records

Members of groups with this privilege are allowed to perform the Task operation on records in which he / she is user selected in the Assigned To field.

### Task Records in State(s):

Members of groups with this privilege are allowed to perform the Task operation on records in which the Status field is set to one of the states highlighted in the list below the privilege. Click on a state to select it. Multiple states can be selected by holding down the CTRL button on your keyboard while clicking on the states you wish to select.

### Task All Records

Members of groups with this privilege are allowed to perform the Task operation on all records irrespective of who is currently assigned to the record.

---

## Edit Privileges



The following privileges are related to the Edit operation. The members of the user group(s) that are granted any of the privileges below will have the **Edit** icon displayed in the button bar and in the Action column of the reports displayed on the Home and Query pages:

### Edit Fields

Members of groups with this privilege are allowed to edit the fields within records. The fields which the members or groups are allowed to edit are based on the [Field Visibility](#) settings on the Edit page for each user group.



### Edit Attachments

Members of groups with this privilege are allowed to edit the attachments within records.



### Edit Source Code List

Members of groups with this privilege are allowed to edit the source code files associated with records when [Source Code Control Integration](#) is enabled.

### Can Be Assignee for Edit

All members of groups with this privilege appear in the Assignee list when a record is edited. This allows you to limit which users can be assigned to a record that is being edited.

---

## Query Privileges



The following privileges are related to the Query operation. The members of the user group(s) that are granted any of the privileges below will have the **Query** icon displayed in the button bar:

### Query

Members of groups with this privilege are allowed to access the query page to generate reports. The fields which the members or groups are allowed to query are based on the [Field Visibility](#) settings on the Query / Home pages for each user group.

### Save Group Queries

Members of groups with this privilege are allowed to add, edit, and delete group saved queries for any group in which they are a member. If this privilege is enabled, the "Query" privilege will also be enabled.

### Save Group Report Layouts

Members of groups with this privilege are allowed to add, edit, and delete group saved report formats for any group in which they are a member. If this privilege is enabled, the "Query" privilege will also be enabled.



### Edit Query Result Set

Members of groups with this privilege are allowed to perform a query and then perform an edit that affects all the records in the query result set. If a user is also a member of a group with Delete privilege, then they can perform a delete of all records matching a query. If this privilege is enabled, the "Query" privilege will also be enabled.

---

## Metrics Privileges



The following privileges are related to the Metrics operation. The members of the user group(s) that are granted any of the privileges below will have the **Metrics** icon displayed in the button bar:

### Home Page Only

Members of groups with this privilege are only allowed to run Metrics from their Home page. They will not have the Metrics icon in their toolbar. This can be used to limit users to running only those Metrics created for their User Group(s). This can not be selected if any of the other three options (above) are selected.

### Metrics

Members of groups with this privilege are allowed to generate Metrics reports and will have the Metrics icon displayed in the top button bar

### Save Group Charts

Members of groups with this privilege are allowed to add, edit, and delete group saved charts for any group in which they are a member. In order to use this function, the "Metrics" privilege mentioned above should also be enabled.

### Save Group Chart Layouts

Members of groups with this privilege are allowed to add, edit, and delete group saved report formats for any groups in which they are a member. In order to use this function, the "Metrics" privilege mentioned above should also be enabled.

---

## Record Visibility Privileges

The following privileges are related to [Record Visibility](#), a feature which restricts a user's access to records based on the user groups in which he or she is a member:

### Edit Record Visibility

When a record is added, it is made visible to all user groups in which the reporter is a member. Members with this privilege are allowed to explicitly select which other groups may view the record when it is added, and also change what groups may view the record at any later time. If a user does not have this privilege and Record Visibility is enabled, then when they add a new record the visibility of the record is based on the [General Preferences](#) settings related to Record Visibility. Typically you should grant this privilege to internal user groups (users who should be able to select which groups can see a record they are reporting) and exclude it from external user groups. This privilege is only meaningful if Record Visibility is enabled in the [General Preferences](#) section. User groups with this privilege will have the field **Make Visible to These User Groups** displayed on the Add, Edit and Edit Results pages if they also have privileges related to the Add, Edit and Edit Results operations.

### Override Record Visibility\*

All members of groups with this privilege are allowed to view all records. This is typically used to allow members of internal user group(s) to view records added by all other external user group(s) without having to be a member of every user group. Member of user groups that have this privilege and the Edit Record Visibility privilege can set the visibility of any record to any set of user groups (not just the user groups to which they belong). This privilege is only meaningful if Record Visibility is enabled in the [General Preferences](#) section.

---

## Edit Visibility Privileges



The following privileges are related to the Edit operation. The members of the user group(s) that are granted any of the privileges below will have the **Edit** icon displayed in the button bar and in the Action column of the reports displayed on the Home and Query pages:

### Edit Assigned Records

Members of groups with this privilege have the ability to edit only those records where he/she is the current Assignee.

### Edit Records in State(s):

Members of groups with this privilege have the ability to edit only those records where the current status is one of the state(s) selected for this privilege. Hold down the CTRL button on your keyboard to select multiple states.

### Edit if State Manager

Members of groups with this privilege have the ability to edit only those records where he/she is the state manager for the record's current state. A state manager for a record is based on the combination of the project and form selected for the record (see [Managing Projects](#)).

### Edit if Reporter in State(s):

Members of groups with this privilege have the ability to edit only those records where he/she is the user listed in the Reported By field and the current state of the record is one of the state(s) selected for this privilege.

### Edit All Records

Members of groups with this privilege enabled have the ability to edit any record irrespective of the record's current status or assignee.

---

## Email Content Privileges

The following privileges are associated with the content included in the email notification messages sent by Tracker. The privileges represent the components of an email notification message as configured in the [Email Rules](#) section.

### Greeting

Members of groups with this privilege receive email notification messages with the Greeting section included

### Introduction

Members of groups with this privilege receive email notification messages with the Introduction section included

**Operation Description**

Members of groups with this privilege receive email notification messages that contain the Operation Description section

**Link**

Members of groups with this privilege receive email notification messages that contain a hyperlink to the View page of the record listed in the email message

**History Comment**

Members of groups with this privilege receive email notification messages that include the history comment entered during the operation that triggered the notification message

**Fields**

Members of groups with this privilege receive email notification messages that include the record's fields that are [visible](#) to this user group via email

**Signature**

Members of groups with this privilege receive email notification messages with the Signature section included

**Clone Privileges**

The following privileges are associated with the cloning (copy record) feature.

**View Clone Information**

Members of groups with this privilege will have the [Clone Info](#) section visible on the View page. The Clone Info section of the View page includes information about and links to the "parent" (record that the record being viewed was cloned from) as well as the "children" (clones created from the record being viewed), if any.

**Clone Record**

Members of groups with this privilege can perform the [Clone](#) operation from the View page. This privilege is not needed to perform a Task operation that has been [configured to clone a record](#). If you wish to control when a record can be cloned (based on the Status of the record) and what fields must (or may) be modified in the clone (child record) immediately after the clone operation, then we recommend that you do not enable this privilege. Instead, you should configure (or add) some Transitions to perform the clone operation.

**Alert Privileges (Enterprise Edition Only)**

 The following privileges are related to [Alerts](#), a feature which allows alert notification messages to be sent when a record has not changed state during a certain period of time. These privileges will only be displayed if an Alerts [License Key](#) has been entered and the feature has been enabled in the [General Preferences](#) section:

**View Alert Settings**

Members of groups with this privilege are allowed to view the alert settings for a record. In addition, members of groups with this privilege will have the **View** icon present in the button bar and in the reports displayed on the Home and Query pages.

**Edit Own Alert Settings**

Members of groups with this privilege are allowed to modify the alert settings for records in which they are the current assignee. In addition, members of groups with this privilege will have the **Edit** icon present in the button bar and in the reports displayed on the Home and Query pages.

**Edit Alert Settings**

Members of groups with this privilege are allowed to modify the alert settings for a record. In addition, members of groups with this privilege will have the **Edit** icon present in the button bar and in the reports displayed on the Home and Query pages.

**Discussion Privileges (Enterprise Edition Only)**

 The following privileges are related to [Discussion](#), a feature which allows users to discuss various topics within a particular record. These privileges will only be displayed if a Discussion [License Key](#) has been entered and the feature has been enabled in the [General Preferences](#) section. The members of the user group(s) that are granted any of the privileges below will have the **Discuss** icon displayed in the button bar and other discussion icons in the reports displayed on the Home and Query pages:

**View Messages**

Members of groups with this privilege may view messages within discussion threads for any record the group can access.

**Post Messages**

Members of groups with this privilege may post a new message or reply to a message within the discussion threads for any record the group can access. Granting this privilege to a group automatically grants the group the "View Messages" privilege as well.

**Initiate Discussion Threads**

Members of groups with this privilege may create a new discussion thread for any record the group can access. Granting this privilege to a group automatically grants the group the "View Messages" and "Post Messages" privileges as well.

**Edit Messages**

Members of groups with this privilege may edit the messages within a discussion for any record the group can access. Granting this privilege to a group automatically grants the group the "View Messages" privilege as well.

**Delete Messages and Threads**

Members of groups with this privilege may delete the messages and / or threads within a discussion for any record the group can access. Granting this privilege to a group automatically grants the group the "View Messages" privilege as well.

The privileges above make reference to "any record the group can access". If record visibility is enabled within a workgroup, the user can only access a record or the discussion(s) within a record if the user is a member of a user group to which the record is visible.

**Privileges for Restricted User Groups**

**Edit User Group**

OK Cancel

Group ID **RestrictedUsers**

Description

---

General Privileges	Add Privileges	View Privileges	Task Privileges
<input checked="" type="checkbox"/> Toolbar Help *	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> View Fields	<input type="checkbox"/> Task All Records
<input checked="" type="checkbox"/> Context-Sensitive Help *	<input checked="" type="checkbox"/> Add Attachments via Add Page	<input checked="" type="checkbox"/> View Attachments	
<input checked="" type="checkbox"/> Edit Own User Account *		<input type="checkbox"/> View Record History	
		<input type="checkbox"/> View User Information	

---

Edit Visibility Privileges	Edit Privileges	Discussion Privileges	Email Content Privileges
<input checked="" type="checkbox"/> Edit if Reporter in State(s): <div style="border: 1px solid gray; padding: 2px; width: fit-content;">Reported Scheduled In Development</div>	<input checked="" type="checkbox"/> Edit Fields	<input type="checkbox"/> View Messages	<input checked="" type="checkbox"/> Greeting
	<input checked="" type="checkbox"/> Edit Attachments	<input type="checkbox"/> Post Messages	<input checked="" type="checkbox"/> Introduction
			<input checked="" type="checkbox"/> Operation Description
			<input checked="" type="checkbox"/> Link
			<input checked="" type="checkbox"/> History Comment
			<input checked="" type="checkbox"/> Fields
			<input checked="" type="checkbox"/> Signature

---

Privileges marked with \* are global. Click on the Help link for more information.

OK Cancel

The following are the set of privileges available for Restricted User Groups:

**General Privileges**** Toolbar Help\***

Members of groups with this privilege are allowed to access the help documentation by clicking on the Help icon in the Button bar. Clicking on the Help icon will open a browser window to display either the default Tracker Help guide page or the URL entered for the [Custom Help Link for Restricted Users](#) option in the [General Preferences](#) section.

**Context-Sensitive Help Link\***

Members of groups with this privilege are allowed to access the help documentation by clicking on the context-sensitive "Help" links that appear in the upper right corner of each page in Tracker. Clicking on the "Help" link will open a browser window displaying the specific Help section which describes the page where the link was clicked.

### Edit Own User Account\*

Members of groups with this privilege are allowed to make changes to the contact information listed in their user account. Users with this privilege can click on the [Account Info](#) link in the upper right corner of the Home Page to edit the information in their user profile

---

## Add Privileges



These privileges are associated with creating records in Tracker. Members of user groups that are granted any of these Add privileges will have an **Add** icon displayed in the top button bar.

### Add

Members of groups with this privilege are allowed to add records

### Add Attachments via Add Page

Members of groups with this privilege are allowed to add an Attachment on the Add page (along with the original problem record)

---

## View Privileges



These privileges are associated with viewing records in Tracker. Members of user groups that are granted any of these View privileges will have an **View** icon displayed in the top button bar and in the Action column of reports on the Home Page.

### View Fields

Members of groups with this privilege are allowed to view the fields within records. The fields which the members of groups are allowed to view are based on the [Field Visibility](#) settings on the View page for each user group.

### View Attachments

Members of groups with this privilege are allowed to view attachments within records

### View Record History

Members of groups with this privilege are allowed to view record history (audit trail documenting changes made by whom and when)

### View User Information

When the "Assigned To" or "Reported By" fields appear on the View Page or in reports on the Home page, all members of groups with this privilege will be able to click on the user's name to see the details in their user account (e.g. phone number, email address, company name)

---

## Task Privileges



The following privilege is associated with performing the Task operation on records. Members of user groups with this privilege will have a **Task** icon displayed in the top button bar and in the Action column of reports on the Home Page.

### Task All Records

Members of groups with this privilege are allowed to perform the Task operation on any record to which they have access.

---

## Edit Visibility Privileges



The following privileges are related to the Edit operation. The members of the user group(s) that are granted the privilege below will have the **Edit** icon displayed in the button bar and in the Action column of the reports displayed on the Home and Query pages:

### Edit if Reporter in State(s):

Members of groups with this privilege have the ability to edit only those records where he/she is selected in the Reported By field and the current status is one of the state(s) selected for this privilege. Hold down the CTRL button on your keyboard to select multiple states.

---

## Edit Privileges



The following privileges are related to the Edit operation. The members of the user group(s) that are granted the privilege below will have the **Edit** icon displayed in the button bar and in the Action column of the reports displayed on the Home and Query pages:

### Edit Fields

Members of groups with this privilege are allowed to edit the fields within records. The fields which the members or groups are allowed to edit are based on the [Field Visibility](#) settings on the Edit page for each user group.

### Edit Attachments

Members of groups with this privilege are allowed to edit the attachments within records.

---

## Discussion Privileges

 The following privileges are related to [Discussion](#), a feature which allows users to discuss various topics within a particular record. These privileges will only be displayed if a Discussion [License Key](#) has been entered and the feature has been enabled in the [General Preferences](#) section. The members of the user group(s) that are granted any of the privileges below will have the **Discuss** icon displayed in the button bar and other discussion icons in the reports displayed on the Home and Query pages:

### View Messages

Members of groups with this privilege may view messages within discussion threads for any record the group can access.

### Post Messages

Members of groups with this privilege may post a new message or reply to a message within the discussion threads for any record the group can access. Granting this privilege to a group automatically grants the group the "View Messages" privilege as well.

---

## Email Content

The following privileges are associated with the content included in the email notification messages sent by Tracker. The privileges represent the components of an email notification message as configured in the [Email Rules](#) section.

### Greeting

Members of groups with this privilege receive email notification messages with the Greeting section included

### Introduction

Members of groups with this privilege receive email notification messages with the Introduction section included

### Operation Description

Members of groups with this privilege receive email notification messages that contain the Operation Description section

### Link

Members of groups with this privilege receive email notification messages that contain a hyperlink to the View page of the record listed in the email message

### History Comment

Members of groups with this privilege receive email notification messages that include the history comment entered during the operation that triggered the notification message

### Fields

Members of groups with this privilege receive email notification messages that include the record's fields that are [visible](#) to this user group via email

### Signature

Members of groups with this privilege receive email notification messages with the Signature section included

---

## Using Can Be Assignee for Add/Edit Privileges to Replace User Type

User Type is a user account property that has been deprecated and is planned to be removed in a future release. This property determines whether a user can be listed as a possible selection in the Assigned To list on the Add and Edit pages. This property is only meaningful if the Enable User Type Property option is enabled in User Management System (UMS). It is recommended that you discontinue use of this property since it will be removed in a future release. Instead, the privileges [Can Be Assignee for Add](#) and [Can Be Assignee for Edit](#) can be used to limit which users are available in the Assigned To field on the Add and Edit pages.

## Overview

A current snapshot of all user sessions can be found in the User Sessions section in the Admin page. Each user session begins when a user logs in and ends when they click the Logoff icon (or when you close their session, see below). A tally of user sessions by license type as well as total sessions allowed by each license key appears at the top of the page. Please note that the Admin user session is not counted against the license limit.

To see a list of current User Sessions:

1. Login to the [workgroup](#) as Admin.
2. Click on the **Admin** icon.
3. Click on the **User Sessions** button.
4. By default the list of sessions will be sorted by User ID (ascending). To change the sort order, click on the UserId, Last Login Time, or License Type column label. Clicking a column label a second time will change sort order (ascending to descending or vice versa). When you click on the License Type column, it will use User ID as a secondary sort criterion (sort by User ID ascending for those users with the same License Type).
5. To end a user session, click on the **Logoff** button, then click **OK** on the popup. More information about closing user sessions can be found below.

### User Sessions

OK

License Type	User Session(s)
Static	2
Floating	0 (0 allowed per installation)
Restricted	0

Options	User ID (Name)	Last Login Time	License Type
	Admin (Admin)	02/13/2007 10:29:32 AM	Not Applicable
<input type="button" value="Logoff"/>	dev_one (Developer One)	02/13/2007 10:29:46 AM	Static
<input type="button" value="Logoff"/>	qa_mgr (QA Manager)	02/13/2007 10:30:09 AM	Static

OK

## Closing User Sessions

A listing of each individual user session follows, which includes the User ID and last login time. The license type is listed for each user session. A **Logoff** button appears for each user session except Admin. You can terminate a user session by clicking the Logoff button. This is useful in cases where the limit of active floating user sessions has been reached causing another user to be unable to login. Also, this Logoff functionality can be used to clear out all user sessions when Administrative tasks need to be performed on the database (database backup, making large changes, etc.)

**Note:** A user may only terminate their session by clicking the **Logoff** icon. **Simply exiting their browser will not terminate their session.** If a user does exit their browser (or shuts down their machine) without clicking the Logoff icon, they can end their previous session by attempting to login again. At that point they will be offered an opportunity to terminate their previous session. By answering YES to terminating their previous session (and then clicking the Logoff icon at some point after successfully logging in this time), they can remove any "stale" sessions they have created without your assistance. Similarly, if a user browses off to another site without clicking the Logoff icon to end their Tracker session, they can click the Back button on their browser several times to return to the last Tracker page they were on and then click the Logoff icon. Or, they can simply browse back to the login page, login again (in this case no message about a previous session will be displayed as cookie information in their browser lets us know which session they were previously using), then click the Logoff icon on the Home page when it is displayed. Tracker does not allow more than one active session per user account (irrespective of license type), so if a user logs in and then logs off they can always be certain that they have not left any active sessions around. The information above is explained to your users in the [Logging In](#) section of the User's Guide, though you may wish to provide an explanation that is more specific to your Tracker configuration.

## Session Timeout

A session timeout is configured by default in all Tracker workgroups. This timeout will end a user's session after a certain length of inactivity time (time where the user has not performed any actions in Tracker). The inactivity time is based on last transaction between the user's browser and the web server. A user typing information into the Add page could be counted as inactivity because the browser does not communicate with the web server until the user clicks on the "Add" button to save the information entered on the form.

The session timeout can be adjusted for each workgroup through your web server settings in Internet Information Server. Because the way a user's inactivity is determined does not account for some cases where the user is actively using Tracker, **it is recommended that you do not set the session timeout to less than 120 minutes.**

To adjust the session timeout:

1. Launch Internet Services Manager for IIS .
2. Under the web site where you have installed Tracker, locate the virtual directory of the workgroup you wish to modify.
3. Right click on the virtual directory and select **Properties**.
4. In the Virtual Directory tab, click on the **Configuration** button.
5. Click on the **App Options tab**. You will find the Session Timeout option under Enable Session State. Specify a value for Session Timeout in minutes. The default is 720 minutes. **It is recommended that you do not set this value to less than 120 minutes.**
6. Click **OK** to save your selection.
7. Restart IIS so this new setting will take effect.


**NetResults Tracker**

  
 General Preferences
 

Help Topics	<<	>>
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General Preferences are workgroup-wide options that can be set by a Tracker Administrator. To modify the General Preferences:

1. Login to the [workgroup](#) as Admin or a user that is a member of the Admin user group
2. Click on the **Admin** icon
3. Click on the **General Preferences** button
4. Make any desired changes and click **OK** to save them

## General Options

- **Page Title**

Enter the text that should be displayed in the browser's page title. By default, the text "<Template Name> Tracker (<workgroup>)" will be displayed. <Template Name> is the name of the template selected for the workgroup when it was created (e.g. Product Development, Web Site Development, Help, Support, Knowledge Base, etc.). <workgroup> is a variable to represent the name of the workgroup (e.g. pteval, ptswdev1, ptdev, ptweb, etc.). Up to 80 characters can be entered.

- **Required Field Highlights**

Check the box(es) for each method you wish to use to highlight required fields on the [Add Page](#), [Submit Page](#) and during the [Task operation](#). Checking the box for "Color" will highlight the required field's label in the color selected for the [Required Field Label Text](#) option in the [Color Preferences](#) section. Checking the box for "Bold" will highlight the required field's label in **bold** type. Checking the box for "Character" will append a character at the end of the required field's label. A text box to enter a character will be displayed when the box for the "Character" option is checked.

Checking any of the boxes for this option will display the following text at the top of the Add and/or during the Task operation when required fields are present: "Fields marked with \*, **Bold** and **Color** are required fields." Only the methods selected will be mentioned in this text. For example, if only the methods "Color" and "Character" are selected, the displayed text will be "Fields marked with **<character selected>** and **Color** are required fields." A sample with all 3 methods in use is available in the Add Page sample in the [Managing Fields](#) section.

- **Display Order Button on Button Bar**

The order button displays the order form in a separate browser window. If you wish to remove this button from the button bar, select "No".

- **Remove Records from Database on "Delete" Operation**

This option determines whether a delete operation merely marks a record and associated records as deleted (sets "Deleted" field to "Yes", also known as a "soft delete") or executes a true delete and permanently removes these records from the database (also known as a "hard delete"). The default setting for this option is "No".

- **Enable Session Locking with Administrator Level Override**

A record edit locking feature is activated when "Yes" is selected for this option. Users who begin editing, deleting or task operations on a record will lock access to that record until moving to another operation. Record locks can be overridden by users with Administrator level privileges. When an override occurs, the Administrator is notified and asked to confirm the override. The user whose lock has been released, will receive a notification message that their operation was overridden and could not be completed. The default setting for this is "No" (i.e. Session Record Locking is disabled).

- **Include "State Manager" in the Assignee List on Add Operation**

Selecting "Yes" for this preference will allow the value "State Manager" to be displayed in the "Assigned To" field when this field is visible on the Add page. Selecting "State Manager" in the "Assigned To" field on the Add page will assign the newly created record to the user listed as the State Manager in the State Manager section for the combination of Form and Project set in the new record. Please review the [Managing Workflows](#) section for an explanation of how State Managers are used as a means of automatic assignment.

- **Make All Report Privileges Global**

Selecting "Yes" for this preference will allow all privileges related to reports (Query and Metrics) to be applied globally. This indicates that any user group that has Query or Metrics privileges will have the privileges applied irrespective of the Projects and Forms that are visible to the user group. Selecting "No" indicates that the user groups will only have the privileges applied to the Projects and Forms which are visible to the user group. For more detail on what selecting "No" for this option indicates, please review the information about [non-global](#) privileges in the [User Group Privileges](#) Help section.

- **User Name Format for Reports and Email Messages (Home, View, Query and History reports)**

This option determines what will be displayed to identify a user in the Reported By and Assigned To fields in the Home, View, Query, History, and Email Notification Messages. The selection in this option will also affect the sorting of reports that use the Reported By or Assigned To fields in the layout.

- When "User ID" is selected, the information entered in the User ID field of the user's profile will be displayed and used for sorting in the reports.
- When "Full Name" is selected, the information entered in the First and Last Name of the user's profile will be displayed. The name will be sorted alphabetically by first name in the reports.
- When "First Name" is selected, the information entered in the First Name field of the user's profile is displayed and used for sorting in the reports.
- When "Last Name" is selected, the information entered in the Last Name field of the user's profile is displayed and used for sorting in the reports.

- **Report Sort Order (Query and Metrics)**

This option determines how reports will be sorted in the pulldowns which display the list of available reports on the Home, Query, Metrics and Preferences pages. Selecting "Report Name, then User Group" will sort the reports by name first, then by the user group to which the report is accessible. Selecting "User Group, then Report Name" will sort the reports by the user group to which each report is accessible, then by report name (e.g. all reports with "[Users]" listed after the name will be grouped together in the list as the primary sort order).

- **Character Set**

This value is set when the workgroup is created through the Workgroup Management System and

determines the languages that the workgroup can support. For information about character set including which languages are supported by the one selected for the workgroup, please review the section [Adding a Workgroup](#).

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## Add-On Features

The options in the Add-On Features section are only available when the corresponding license key has been entered into the [Tracker License Manager](#).

- **Enable Alerts**

Selecting Yes for this option allows you to use the Alerts feature. The Alerts feature allows you to configure Tracker to send an alert message at a specific date and time or when a record's state has not changed within a certain period of time. Please review the [Alerts](#) section for more details about using this feature. This option will not be displayed unless you are using Tracker Enterprise Edition and you have entered a valid Alerts license key in the [License Manager](#) (or you are using a trial version).

- **Enable Discussion**

Selecting Yes for this option allows you to use the Discussion feature. Discussion allows various threads to be initiated within each record for users and groups to view and post messages. Please review the [Discussion](#) section for more details about using this feature. This option will not be displayed unless you are using Tracker Enterprise Edition and you have entered a valid Discussion license key in the [License Manager](#) (or you are using a trial version).

- **Enable API**

Selecting Yes for this option allows you to use the Add API feature. This option will not be displayed unless you have entered a valid API license key in the [License Manager](#). This feature must be installed using its own installation setup program separate from the Tracker installation.

- **API User**

The user selected will determine the settings used when a record is created via the Add API. These settings include the privileges and field visibility granted to this user based on group membership. This option will not be displayed unless you have entered a valid API license key in the [License Manager](#).

- **Enable Submit via Web for Unregistered Users**

Selecting Yes for this option allows you to use the Submit Page. The Submit Page allows end users to add records to this workgroup without a user account. Please review the [Submit Page](#) section for more details about using this feature. This option will not be displayed unless you have entered a valid Submit license key in the [License Manager](#) (or you are using a trial version).

- **Enable Submit via Email**

Selecting Yes for this option allows you to use the Submit via Email feature. Please review the [Submit via Email Overview](#) for more details about using this feature. This option will not be displayed unless you have entered a valid Email license key in the [License Manager](#).

- **Enable Knowledge Base**

Selecting Yes for this option allows you to use the Knowledge Base feature. This feature allows you to publish articles that can be searched by your end users to find answers to common issues or questions. Please review the [Knowledge Base Overview](#) section for more details about using this feature. You must enter a valid Knowledge Base license key in the [License Manager](#) (or you are using a trial version).

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## Home Page Options

The options available in this section are related to items displayed on the Home Page.

- **Include "Default [Users]" in the Home Page Reports**

Selecting "Yes" for this option will display the "Default [Users]" saved query for selection in the saved query pulldowns on the Home Page. Selecting "No" will exclude this saved query from being displayed in the saved query pulldowns on the Home Page. [Default \[Users\]](#) is a saved query that is included in a workgroup by default and is designed to display all records in the workgroup.

- **Home Page Message for Restricted Users**

Enter text to be displayed on the Home Page of all Restricted Users. This can be used to enter instructions or announcements. Up to 300 characters can be entered and the text is treated as plain text. The Home Page image in the [Home Page](#) section of the User Guide shows an example of a Home Page message stating "Tracker will be upgraded over the weekend..."

- **Home Page Message for Standard Users**

Enter text to be displayed on the Home Page of all non-Restricted users. This can be used to enter instructions or announcements. Up to 300 characters can be entered and the text is treated as plain text. The Home Page image in the [Home Page](#) section of the User Guide shows an example of a Home Page message stating "Tracker will be upgraded over the weekend..."

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## Help Options

The following options are related to use of the Help and Task icons in a user's Button Bar. For the Help icon, you can customize the link such that standard or restricted users will be directed to the URL you desire when clicking on the Help icon in Tracker. This can be used to direct users to your own custom Help documentation or to an intranet site or other URL that provides information to guide their use of Tracker. For the [Task](#) icon, you can customize the tool tip that is displayed when the mouse is hovered over the Task icon. This can be used to explain to your users the purpose of the Task operation (e.g. "Update Record", "Mark Issue Complete", etc.).

- **Custom Help Link for Restricted Users**

Enter the URL for the page that should be displayed when a Restricted user clicks on the Help icon in the Button Bar. The URL must start with "http://" or "https://". Leaving this option blank will display the default Tracker Help Guide page when clicking on the Help icon.

- **Custom Help Link for Standard Users**

Enter the URL for the page that should be displayed when a Static or Floating user clicks on the Help icon in the Button Bar. The URL must start with "http://" or "https://". Leaving this option blank will display the default Tracker Help Guide page when clicking on the Help icon. **Note: This setting does not apply to the "Admin" user account.** The Admin user account will be directed to the default Tracker Help Guide page when clicking on the Help icon in the Button Bar.

- **Task Icon Tool Tip for Restricted Users**

Enter the text that should be displayed as a tool tip when a Restricted user hovers their mouse over the Task icon in the Button Bar. Up to 255 characters can be entered. "Mark Task Complete" will be entered for this option by default.

- **Task Icon Tool Tip for Standard Users**

Enter the text that should be displayed as a tool tip when a Static or Floating user hovers their mouse over the Task icon in the Button Bar. Up to 255 characters can be entered. "Mark Task Complete" will be entered for this option by default.

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## Unregistered User Options

The following options are related to the use of the Submit via Web for Unregistered Users and Submit via Email features. Please review the [Submit Page](#) and / or [Submit via Email](#) Help sections for details about these features.

- **Date Format**

Select a format for the Date from the pulldown menu. The format that you choose will be used to display fields that contain date information on the Submit Page and outgoing email notification messages sent to the users of the Submit Page and Submit via Email features.

- **Time Format**

Select a format for the time from the pulldown menu. The format that you choose will be used to display all fields that contain time information on the Submit Page and outgoing email notification messages to the users of the Submit Page and Submit via Email features. Choosing 12 hour for the time format will display times followed by AM or PM to denote the appropriate 12 hour period, such as 02:05:38 PM. Choosing 24 hour as the time format will display times without the AM or PM designation, such as 14:05:38.

- **Time Zone**

Select a time zone from the pulldown menu. The time zone that you choose will be used to display all fields that contain time information on the Submit Page and outgoing email notification messages to the users of the Submit Page and Submit via Email features. For a list of available time zones in your operating system, please see the following section:

[Windows 2003 / 2000 Time Zones](#)

- **Adjust To Daylight Saving Time (DST)**

Check this box if you wish to have Tracker adjust time information to account for daylight saving time. If you selected a time zone in which daylight saving time is observed, we recommend that you enable this option.

- **User Groups**

This option determines which Projects and Forms are visible to Unregistered Users on the [Submit Page](#). Any Projects and Forms visible to the selected user groups will be available on the Submit Page. To see which user groups have visibility to a Project (and its respective form(s)), check the Project's [Form Visibility](#) section.

This option also determines which set of privileges will be used to send email notifications to the users submitting issues via the Submit Page or [Submit via Email](#) features. The group(s) selected will determine what fields and other content (greeting, introduction, link, history comment, etc.) are included in the outgoing email notification messages. For more information on how fields are included in email notification messages for each user group, please review the [User Groups - Field Visibility](#) section. For more information on how other email content is included in email notification messages for each user group, please review the [Privileges - Email Content](#) section.

Select one or more user groups for this option. To select multiple user groups, hold down the **Ctrl** button on your keyboard as you click on the user groups.

- **Send Email Notifications On**

Select the actions that will result in email notifications being sent to users of the Submit Page and Submit via Email features. Selecting "Submit via Web" will send email notification messages to users who submit issues via the Submit Page. Selecting "Submit via Email" will send email notification messages to users who submit issues via the Submit via Email feature. Selecting "Updates After Submit" will send email notification messages for any operation after an issue has been added (e.g. edited, change of status, change of assignment, etc.) to the email address captured in the "Unregistered User Email" field. Selecting <None> will not send any email notification messages to users of the Submit Page or Submit via Email features or to the email addresses in the Unregistered User Email field. For more information on actions after adding an issue that will result in email notifications, please review the [Email Rules](#) section.

---

## Record Visibility Options

Record Visibility allows a Tracker administrator to set up an environment where access to records is restricted on a user group basis. Disabling record visibility can have the benefit of faster performance since enforcing record visibility restrictions requires more complex database queries. Please review the [Configuring Record Visibility](#) section below for more information about setting up this feature.

Use the options below to enable and configure Record Visibility settings. Then, set the related [user group privileges](#) in the User Administration section for internal user groups. If there are already records entered into the workgroup, you may wish to edit the record visibility of those records using the [Edit Results](#) operation in the Query page.

**NOTE:** Record Visibility is not applied to Restricted users since by design these users are already limited to accessing only those records which they themselves have submitted. If you have a mix of Standard (Static or Floating) and Restricted users in your system and you want to limit what records restricted users can access,

but all of the standard users are allowed to see any record, you don't need to enable Record Visibility. Restricted users can only access the records they themselves have submitted. Record Visibility is not needed to ensure that Restricted users can only see certain records.

- **Enable Record Visibility**

Selecting "Yes" for this option will enable the Record Visibility feature, which will restrict the records a user can access based on his/her user group membership.

- **Limit Record Visibility Selection To A User's Own Groups**

For those users with the ability to edit the visibility of a record, this option selects whether they should only be able to select from user groups that they are a member of (Yes), or whether they should be able to pick any user group (No). For maximum security, it is recommended that this preference be set to "Yes".

- **By Default Include "Users" Group for Record Visibility on Add Operation**

When a record is added, it is automatically made visible to the user groups in which the user reporting the record is a member. This option selects whether the "Users" group should be included in this list of user groups (Yes) or not (No). If you intend to use the record visibility feature to limit access to records, you should select the value No (since all non-Restricted users are a member of the "Users" group, including this group means that all non-Restricted users can view any record). Non-Restricted users are users that have "Static" or "Floating" selected as the license type. Restricted users are users that have "Restricted" selected as the license type. For more information about distinguishing between users of different license types, please review the [Users](#) section.

- **Visibility for Records Submitted by Unregistered Users via Web**

Since there is no registered user associated with issues reported via the [Submit Page](#), this option allows you to configure the Record Visibility for issues submitted via the Submit Page. If the Submit Page and Record Visibility are enabled, select the user groups which should be able to access records submitted via the Submit page. The Admin user group is not available for selection in this field because the Admin user group can always access any record added via the Submit page. To select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting the user groups.

- **Visibility for Records Submitted by Unregistered Users via Email**

When processing incoming emails, Tracker may not be able to map an incoming email to a user account (there is no user account with the same email address). In that case, this option allows you to configure the Record Visibility for issues submitted via email. If the [Submit via Email](#) feature and Record Visibility are enabled, please select the user groups which should be able to access records submitted via email. The Admin user group is not available for selection in this field because the Admin user group can always access any record added via email. To select multiple user groups, hold down the **Ctrl** button on your keyboard while selecting the user groups. If the option "Action for Unmapped Emails" is set to "<Delete Email>" in the [Incoming Email Settings](#) for a form, this option does not apply since it is only used for unmapped emails. For further information please review the [Record Visibility for Records Submitted via Email](#) help section.

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## Configuring Record Visibility

Record Visibility is a feature that restricts the records a user is able to access based on user group membership. This is useful in environments where you need to limit the records that are accessible to customers or external users while still allowing these users to access records that are pertinent to their company or account.

Before enabling Record Visibility, decide whether you really need it. Record Visibility should only be enabled if it is really needed because it involves extra configuration. If the configuration is not set up correctly, users will not be able to access records you intend for them to access.

If you have a mix of Standard and Restricted users in your system and you want to limit what records restricted users can access, but all of the standard users are allowed to see any record, you don't need to enable Record Visibility. Record Visibility is **not** applied to Restricted users since by design these users can only access the records they themselves have submitted. Record Visibility is not needed to ensure that Restricted users can only see certain records.

If you want to keep some of your Standard users from being able to access records added by other Standard users, you can use Record Visibility to achieve this. For example, if you have external customers, vendors or partners configured as Standard users and you don't want users from Company A to be able to see records added by users in Company B, Record Visibility can be used to be sure that users from Company A can only see records added by Company A.

To configure Record Visibility, please use the steps below:

1. Enable the feature and set the Record Visibility options in the [General Preferences](#) section described above
2. Set the Record Visibility privileges in the [Privileges](#) section
3. For any user that is not a member of a user group with the privilege "Override Record Visibility" (most likely all external users or customers), add the user to at least one user group other than the "Users" group so that this user can see the records he/she reported. For example, you may choose to create a user group for each company, vendor, or external user. This is required because by setting the option **By Default Include Group 'Users' for Record Visibility on Add Operation** to "No" in the General Preferences, any records added to the system will not be accessible to members of the Users group. If the user is a member of only "Users" group, then he/she cannot even view the records they submitted. Refer to the [User Groups](#) section for details on creating user groups and adding users as members
4. Set the visibility for any existing records in the workgroup. By default, any existing records are visible to the Users group (which includes all users in the workgroup). If you are enabling Record Visibility after records have already been added to the workgroup, you may wish to set the visibility for existing records. You can use the [Edit Records](#) operation on the Query Results page. To use the Edit Records operation and set the visibility for records, you must be a member of a user group with the "Edit Query Result Set" and "Edit Record Visibility" privileges enabled. More information can be found in [Privileges](#) Help section. It is recommended that you enable these privileges for the Admin user group to perform the steps below.

To set the visibility for existing records: **Note: Please ensure you have a backup of your workgroup database and attachments as the Edit Records operation cannot be undone.**

- a. Login to the [workgroup](#) as Admin (or a user with the required privileges mentioned above)

- b. Click on the **Query** icon
- c. Click on the **Clear** button
- d. Enter criteria to return the set of records for which you wish to change the visibility. or, if you wish to return all records, do not enter any criteria.
- e. Click on the **Run Query** button
- f. Click on the **Edit Records** in the upper right corner
- g. In the field **Make Visible to These User Groups**, select the user group(s) to which you wish to make this set of records visible. To select multiple user groups, hold down the **Ctrl** button on your keyboard as you select the user groups.
- h. Click **OK** to save the change and click **OK** to confirm the operation

## Record Visibility and Metrics

Record Visibility is not enforced in the Metrics section. Metrics by their nature tend to be global. They are usually used by managers with access to most of the data. For situations where someone should have limited, you can use the [Home Page Only](#) user group privilege to show the user a defined set of charts that they can access from their Home Page.

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## Source Code Control Options

The following options are related to enabling the Source Code Control Integration feature. Please review the [Overview and Requirements](#) for more information about this feature.

- **Enable Source Code Control Integration**  
Setting this option to Yes allows your database to interact with the Source Code Control system specified in the next 3 options.
- **Source Code Control Product**  
Microsoft Visual Source Safe is the only product that can be used for Source Code Control Integration at this time.
- **Path to srcsafe.ini**  
Specify the path to the srcsafe.ini file that is present on the server machine where Tracker is installed.
- **Path to ss.exe**  
Specify the path to the ss.exe file that is present on the server machine where Tracker is installed.


**NetResults Tracker**




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User Preferences

[Help Topics](#)
<<
>>

## Default Preferences for New Users

A set of preferences can be applied by default to a user account that is added to the workgroup. Each user can modify his or her own preferences in the [Preferences](#) section. There are different preferences available depending on the user's license type (Static / Floating or Restricted).

### Select Default Personal Preferences for New Users (License Type: Static / Floating)




**Note:** To update the default personal preferences for new users, change the settings below and click the "Update" button. To update default personal preferences and then propagate the changes to some (or all) existing User Groups, change the settings below and click the "Update & Push to Selected User Groups" button. You will be able to select the User Groups to update after clicking the button.

#### Report Settings

Maximum Records	<input type="text" value="20"/> per page
First Home Page Report	<input type="text" value="Assigned To Me [Users]"/>
Second Home Page Report	<input type="text" value="Reported By Me [Users]"/>
Third Home Page Report	<input type="text" value="&lt;No Report&gt;"/>
Chart Width x Height	<input type="text" value="700"/> x <input type="text" value="300"/>
Display Report User Groups in Home Page	<input checked="" type="checkbox"/>

#### Help Settings

Display Field Help

#### Date Settings

Date Format	<input type="text" value="mm/dd/yyyy"/>
Time Format	<input type="text" value="12 Hour"/>
Time Zone	<input type="text" value="[UTC+0000] Universal Coordinated Time"/>
Adjust to Daylight Saving Time (DST)	<input type="checkbox"/>
Exclude Time From Reports	<input type="checkbox"/>
First Day of the Week	<input type="text" value="Sunday"/>
Business Days	<input type="checkbox"/> Su <input checked="" type="checkbox"/> Mo <input checked="" type="checkbox"/> Tu <input checked="" type="checkbox"/> We <input checked="" type="checkbox"/> Th <input checked="" type="checkbox"/> Fr <input type="checkbox"/> Sa

To **modify** the default preferences for new users:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Preferences** button
4. Select the **User License Type**, then click on the **Continue** button
5. Set the preferences (each option is described in detail below)
6. Click **Update** to save your selections or click **Update & Push to Selected User Groups** to push some or all of the user preference settings to some or

all user groups. The [Push User Preferences](#) section has more information about this operation.

## Report Settings

- **Maximum Records per Page**

This option restricts the maximum number of records to be displayed in the results of Home and Query reports. The default is 20 records per page. The maximum value for this setting is 100 records per page.

- **First, Second, and Third Home Page Reports**

These options specify the saved queries or charts which will be displayed on the Home Page by default. In most cases, the saved query **Assigned To Me [Users]** is selected for the **First Home Page Report** by default, which will display all records assigned to the login user and the saved query **Reported By Me [Users]** is selected for the **Second Home Page Report**, which will display all records created by the login user. **<No Report>** is selected for the **Third Home Page Report** by default. If you do not want a report displayed for the First, Second or Third reports, select the option **<No Report>**. If this option is selected for all 3 Home Page reports, the following message will be displayed on the Home Page: "No Home Page Reports are configured. If you would like a report to appear here, click the Preferences link above, select one or more Home Page Reports, and click OK."

When setting the preferences for **Static / Floating users**, all saved queries and charts for the [Users] group within your database will appear in the pull-downs for the Home Page reports. When setting the preferences for **Restricted users**, saved queries and charts for the [RestrictedUsers] group will be available. Saved charts cannot be selected for the Home Page reports for Restricted users. To modify saved queries, please see the section [Using Saved Queries & Reports](#). To modify saved charts, please review the section [Metrics](#) section.

- **Chart Width x Height**

Enter the width and height that should be used to display a saved chart on the Home Page. 700 x 300 is entered by default. This option is available for Static / Floating users only.

- **Display Report User Groups in Home Page**

Checking the box for this option will display the user name in brackets after the report name for group saved reports in the pull-down for each Home Page report. For example, the "Assigned to Me" report will be displayed as "Assigned to Me [Users]" in the pull-down for each Home Page report when this option is enabled. For Restricted users or users that only belong to one or two groups, it is recommended that this option be disabled (unchecked).

## Help Settings

- **Display Field Help**

Checking the box for this option will display the field help icon to the left of the fields on the Add, Edit, and Task pages in Tracker. When information is entered into the [Field Help](#) section of a field's attributes in the Managing Fields section and this preference is enabled, the user can move the cursor over the Field Help icon to see a description of the field.

## Date Settings

The following settings govern the way date and time fields are displayed for users by default.

- **Date Format**

Select a format for the Date from the pull-down menu. The format that you choose will be used to display fields that contain date information within Tracker.

- **Time Format**

Select a format for the time from the pull-down menu. The format that you choose will be used to display all fields that contain time information within Tracker. Choosing 12 hour for the time format will display times followed by AM or PM to denote the appropriate 12 hour period, such as 02:05:38 PM. Choosing 24 hour as the time format will display times without the AM or PM designation, such as 14:05:38.

- **Time Zone**

The time zone selected will be used for all data in the workgroup. The time zone you select for this option will also be used as the default for new users. To see a complete list of time zones available, please refer to the following section:

[Windows 2003 / 2000 Time Zones](#)

- **Adjust to Daylight Saving Time (DST)**

Checking the box here will enable the system to adjust the workgroup data to account for daylight saving time. If you selected a time zone for the workgroup where daylight saving time is observed, it is recommended that you enable this option.

- **Exclude Time From Reports**

Check this box if you wish to have Tracker display date information in the reports on the History, Home and Query pages without the time information included. Enabling this preference will also exclude the time information from History, Home and Query reports when they are exported or printed. Enabling this preference does not change how report results are sorted when a date field is selected as one of the "Sort By" fields. When a date field is selected as one of the Sort By fields, the time information is still used for sorting the results even though the time information is not displayed in the report results.

- **First Day of the Week**

Select the day of the week that you want to be displayed in the first column when using the calendar feature for date fields.

- **Business Days**

Check the boxes to the left of the days of the week that should be considered business days by Tracker.

## Export Settings

The following preferences are used when report data is exported from the Tracker Home, Query, and Metrics pages. Data is exported as a CSV (comma separated values) file. However, because there is no firm definition of a CSV standard, you may need to modify some export parameters to allow use of the exported data by other applications (spreadsheet, database, etc.). Tracker and your Tracker Administrator have set these values to defaults that should work in most environments. So in most cases, you should not need to change these settings. If you have an application that is not importing the data correctly, review the information below.

- **Field Separator**

Choose one of the options to be used as the separator between the fields (values) of a report that is being exported. The available options are Comma, Semicolon, and Tab. If you are exporting English language (or Latin1) data in the United States, you should use Comma. If you are exporting English language (or Latin1) data in a country that uses a Comma in floating point numbers to separate the whole number from the fractional part (e.g. 45,125 for 45 and one eighth), you may need to set this to Semicolon. If workgroup has been configured to use the Unicode (UTF-8) character set for multi-language support, Tab will generally work best in most applications.

- **Row Separator**

Choose one of the options to be used as the separator between the rows (lines) of a report that is being exported. The options are Carriage Return & Line Feed (Windows), Carriage Return (Mac OS), and Line Feed (Unix). Choose the appropriate option for the operating system that most of your users will be using on their desktop (the one running the web browser they are using). Users that are running a different operating system than the one selected in these preferences will need to change this option in their personal [Preferences](#) section which can be reached by clicking on the Preferences link in the Home Page.

- **File Extension**

Choose one of the options to be used as the file extension when saving the file containing the exported data. The options are csv, txt, and No Extension. For English language (or Latin1) data, this should be set to csv. For Unicode (UTF-8, multi-language) data this should be set to txt. However, you can also choose No Extension if you wish to create a file without a file extension (without .csv or .txt at the end).

**Note:** When exporting data from a UTF-8 workgroup using the recommended settings listed above, misalignment of the data can occur when viewing the exported data in Excel if the file is not first saved to disk and then opened in one of the two ways listed below. Unfortunately, the default file open in Excel does not properly store multiple line text (as there may be in Tracker TextArea fields) in a single cell. Instead, it puts each line in its own cell which results in misalignment of the fields in the spreadsheet.

For UTF-8 data exported with Field Separator set to Tab, Row Separator set to Carriage Return & Line Feed, and File Extension set to txt, you can get Excel to properly place multiple line data in a single cell using one of the two operations below.

1. From Windows Explorer, select the file to be opened.
2. Right-click on the file and select Open With->Microsoft Excel.

OR

1. From Excel, select File->Open.
2. Locate and select the file that you want from the list (the file you created when you exported the data from Tracker).
3. Hold down the SHIFT key on your keyboard, and then click the Open button (if you do not hold down the SHIFT key, the file may not be processed correctly).

## Query Page Pulldown Settings

- **Enforce Dependencies**

This option determines whether the [dependent relationships](#) between pulldown fields configured in this workgroup will be enforced when using the Query operations. Checking the box for this option will enforce the dependencies. This option cannot be enabled if you have the option **Include Obsolete Items** enabled. This preference can only be set for Static / Floating users.

- **Include Obsolete Items**

This option determines whether the any option menu items that have been [marked as obsolete](#) are available in pulldowns so that they can be selected as search criteria on the Query Page. Checking the box for this option will include obsolete option menu items in the pulldowns on the Query Page. This option cannot be enabled if you have the option **Enforce Dependencies** enabled. This preference can only be set for Static / Floating users.

## Multi-Line Field Settings

- **Display Window**

Select the maximum number of lines that should be displayed when viewing the text within a TextArea field. By default, this will be set to 5 lines. If the contents of a TextArea field extend beyond the number of lines set in this preference, the user will have the ability to scroll to see the complete contents of the field. If the user is using Internet Explorer or Firefox as the browser, the option to expand the window to see the complete contents by clicking on the "+" will be available. The "-" icon is available for collapsing the contents to the original field size.

### Discussion Settings (Enterprise Edition Only)

These preferences apply to the Discussion feature, which is only available in Tracker Enterprise Edition. These preferences are only available for Static / Floating users.

- **New Post Notification**

This option determines when a user will be notified about discussions via email. Selecting **No Email** indicates that a user should not receive any email notification messages related to discussions. Selecting **Receive Email for each New Post** indicates that a user will receive one email message for each new post in a discussion to which he / she is subscribed. Selecting **Receive Email for the first New Post to each Thread** indicates that the user will receive one email for the first new post made to a discussion thread to which he / she is subscribed. Once the user browses to the message list of the thread, the next new post made to the thread will trigger another email to be sent to the user.

- **Invitation Notification by Email**

This option determines whether a user should receive an email message when he / she has been invited to participate in a discussion initiated for a particular record. Selecting **Yes** indicates that the user should receive an email invitation for each new discussion.

- **Message Display Window**

Enter the number of lines of text you wish to see when displaying a message within a discussion. If the contents of a Discussion message extend beyond the number of lines set in this preference, the user will have the ability to scroll to see the complete contents of the message. If the user is using Internet Explorer or Firefox as the browser, the option to expand the window to see the complete contents by clicking on the "+" will be available. The "-" icon is available for collapsing the contents to the original field size. The default setting is 5 lines of text.

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### Push User Preferences to Selected User Groups

The default user preferences can be applied to some or all user groups using the **Update & Push to Selected User Groups** operation that is available after updating the default user preferences. **NOTE: You may wish to make a [backup](#) of your database prior to performing this operation as this operation cannot be undone.**

#### Default User Preferences Updated

The default personal preferences for newly added users have been updated.

To make the personal preferences for some (or all) Standard Users match the new default personal preferences, select the Standard User Group(s) in the list below and click OK. You can also choose to push only some of the new default personal preferences by unchecking items in the list below (only those preferences which are checked will be pushed to the selected User Groups). If you do not wish to update the personal preferences of any Users, click the Cancel button.

Standard User Groups

OK Cancel

[Admins]	All None
[Developers]	
[Managers]	
[QA]	
[Users]	

#### Report Settings

- Maximum Records  20 per page
- First Home Page Report  Assigned To Me [Users]
- Second Home Page Report  Reported By Me [Users]
- Third Home Page Report  <No Report>
- Chart Width x Height  700 x 300
- Display Report User Groups in Home Page  Yes

**Help Settings**Display Field Help  Yes**Date Settings**Date Format  mm/dd/yyyyTime Format  12 HourTime Zone  [UTC+0000] Universal Coordinated TimeAdjust to Daylight Saving Time (DST)  NoExclude Time From Reports  NoFirst Day of the Week  SundayBusiness Days  [Mo, Tu, We, Th, Fr]

To **push** the default preferences to selected user groups:

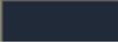
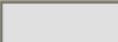
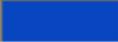
1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **User Preferences** button
4. Select the **User License Type**, then click on the **Continue** button
5. Set the preferences as desired
6. Click the **Update & Push to Selected User Groups** button
7. Select the user groups In the **Standard / Restricted User Groups** field that should have the default preferences applied (Standard or Restricted user groups will be displayed based on the user license type you selected after clicking on the User Preferences button). To select multiple user groups, hold down the Ctrl button on your keyboard while clicking on the desired user groups. Click **All** if you wish to select all user groups. Click **None** if you wish to de-select all user groups.
8. By default all user preferences will be checked (selected) to be applied to the selected user groups. If you only wish to apply certain user preferences, UNcheck the boxes for the preferences that **should not be applied**.
9. Click **OK** to apply the selected user preferences to the selected user groups

Color Preferences can be set to customize the look and feel of the pages in Tracker. You may wish to change the color preferences from their defaults so that the Tracker pages reflect the color scheme of your web site or organization. Please note that setting color preferences may change some style elements that are default for your browser (e.g. If your browser displays buttons with a smooth edge, the smooth edge will be lost when applying color preferences to buttons using the options below).

To set the Color Preferences:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon in the top button bar
3. Click on the **Color Preferences** button
4. To change the color of an item, select a color from the pulldown or select **<Custom>** to enter the Hex code or select **<Default>** to choose the browser's default value. Hex code must be in the format "#XXXXXX". An explanation of each item can be found in the [Color Preference Options](#) section. Your selections are displayed in a preview to the right of the preferences.
5. Click on the **OK** button to save the changes

A **Reset** button is available to reset the color preferences to their settings as of the last time the Color Preferences were saved. A **Cancel** button is available to return to the Admin section without saving any changes to the Color Preferences page.

		OK	Cancel	Reset
<b>Theme</b>	Version 6 <input type="button" value="v"/>			
<b>General Settings</b>				
Button Bar Gradient	Bottom to Top <input type="button" value="v"/>	(IE Browser Only)		
Button Bar Background	<Custom> <input type="button" value="v"/>	#B2CAFC		
Button Bar Version Text	<Custom> <input type="button" value="v"/>	#212A39		
Status Bar Header Gradient	Bottom to Top <input type="button" value="v"/>	(IE Browser Only)		
Status Bar Header Background	<Custom> <input type="button" value="v"/>	#B2CAFC		
Status Bar Header Text	<Custom> <input type="button" value="v"/>	#212A39		
Status Bar Gradient	Top to Bottom <input type="button" value="v"/>	(IE Browser Only)		
Status Bar Background	<Custom> <input type="button" value="v"/>	#E0E0E0		
Status Bar Text	Black <input type="button" value="v"/>	#000000		
Page Background	<Custom> <input type="button" value="v"/>	#FDFDFD		
Page Text (Field Labels)	<Custom> <input type="button" value="v"/>	#0845C0		
Required Field Label Text	<Custom> <input type="button" value="v"/>	#099801		

		OK	Cancel	Reset
<b>General Settings</b>				
Powered by NetResults Tracker				
Status	Editing Record 125	<a href="#">Help</a>		
<b>Edit Record 125</b>				
ID	125			
Text	<input type="text" value="Enhancement"/>			
Text Area	<input type="text" value="A new enhancement requested"/>			
Pulldown *	Option 1 <input type="button" value="v"/>			
Checkbox	<input type="checkbox"/>			
Radio	<input checked="" type="radio"/> One <input type="radio"/> Two			

Required Field Label Text	<Custom>	#099801	
Input Background	White	#FFFFFF	
Input Text (Field Values)	Black	#000000	

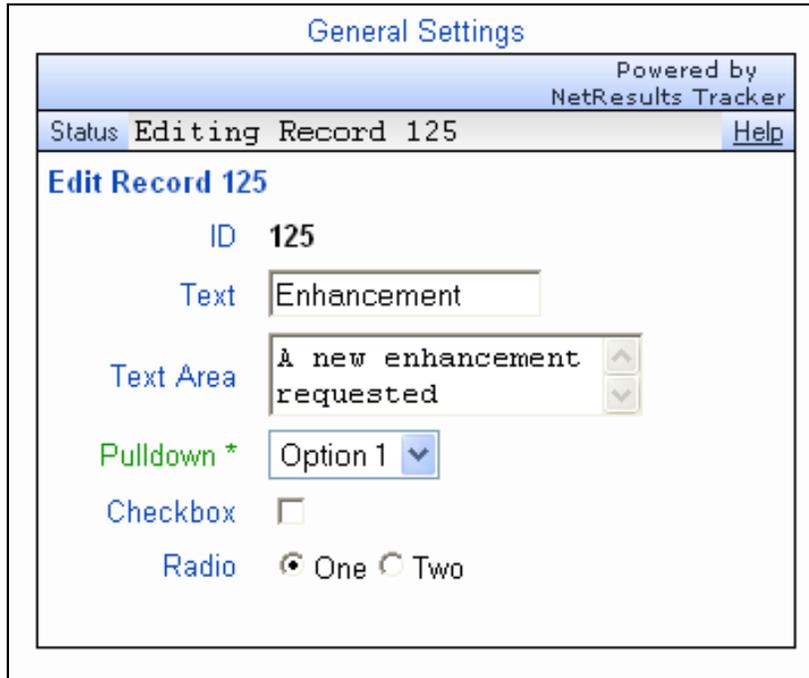
## Color Preference Options

### Theme

A set of pre-defined **Themes** is available. Each Theme has a set of color preferences configured to give Tracker a color scheme that is consistent throughout all pages. Selecting a Theme will update the samples displayed in the rest of the Color Preferences sections (General Settings, IE Browser Settings, etc.).

You can select a theme and accept its default color preference settings or you can choose a theme as a starting point and make changes to individual color preferences as desired. Version 6 is the default theme for new workgroups. Version 5 is the theme that has the color preferences that match the defaults for Version 5.x workgroups.

### General Settings



- **Button Bar Gradient**

Select a method for applying a gradient effect to the Button Bar color (e.g. "Bottom to Top" is the method selected in the Button Bar behind the text "Powered by NetResults Tracker" in the [General Settings Sample](#)). Selecting "None" will not apply the gradient effect to the Button bar color. This effect is only supported in Internet Explorer.

- **Button Bar Background**

The color used in the background of the Button Bar in the Tracker pages (e.g. the area displayed in a light blue color behind the text "Powered by NetResults Tracker" in the [General Settings Sample](#)).

- **Button Bar Version Text**

The color used for the text of the Version text in the upper right corner of the Button Bar (e.g. the color of the text "Powered by NetResults Tracker" in the [General Settings Sample](#)).

- **Status Bar Header Gradient**

Select a method for applying a gradient effect to the Status Bar Header color (e.g. "Bottom to Top" is the method selected in the Status Bar Header behind the text "Status" in the [General Settings Sample](#)). Selecting "None" will not apply the gradient effect to the Status Bar Header color. This effect is only supported in Internet Explorer.

- **Status Bar Header Background**

The background color of the header in the Status Bar (e.g. the light blue color displayed behind "Status" in the [General Settings Sample](#))

- **Status Bar Header Text**

The color of the text in the Status Bar header (e.g. the color of the text "Status" in the [General Settings Sample](#))

- **Status Bar Gradient**

Select a method for applying a gradient effect to the Status Bar color (e.g. "Top to Bottom" is the method selected in the Status Bar behind the text "Editing Record 125" in the [General Settings Sample](#)). Selecting "None" will not apply the gradient effect to the Status Bar color. This effect is only supported in Internet Explorer.

- **Status Bar Background**

The background color of the Status Bar (e.g. the light gray color displayed behind "Editing Record 125" in the [General Settings Sample](#))

- **Status Bar Text**

The color of the text displayed in the Status Bar (e.g. the color of the text "Editing Record 125" in the [General Settings Sample](#))

- **Page Background**

The background color of all of the Tracker pages (e.g. the white color displayed in the background behind the Text, Text Area and Pulldown fields in the [General Settings Sample](#))

- **Page Text (Field Labels)**

The color of the text displayed on the pages in Tracker (e.g. the color of the field labels "Text" and "Text Area" in the [General Settings Sample](#))

- **Required Field Label Text**

The color of the field labels for fields that are marked as "Required" on the [Add](#), [Task](#) or [Submit](#) Pages (e.g. the color of the field label "Pulldown\*" in the [General Settings Sample](#))

- **Input Background**

The color displayed in the area of a field where text or information would be entered (e.g. the white color displayed in the background behind the text "A new enhancement requested" in the [General Settings Sample](#)) Selecting **<Default>** will use the browser's default color for the input background (white).

- **Input Text (Field Values)**

The color of the text entered into a field (e.g. the color of the text "A new enhancement requested" in the [General Settings Sample](#)) Selecting **<Default>** will use the browser's default color for the input text (black).

## IE Browser Button Settings

These settings determine the colors of the buttons for users using the Internet Explorer (IE) browser.



- **Use Default Buttons (& Inputs)**

Checking the box for this option will apply the operating system's default color settings to the buttons for IE users. When this option is enabled, the rest of the IE Browser Button Settings are disabled.

- **Gradient**

Select a method for applying a gradient effect to the button color (e.g. "Bottom to Top" is the method selected in the [IE Browser Buttons Sample](#)). Selecting "None" will not apply the gradient effect to the button color. This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

- **Background**

The color used in the background of the buttons in the Tracker pages (e.g. the light blue color behind the text "Click" on the button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

- **Text**

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Click" in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

- **Border**

The color of the border of the button in the Tracker pages (e.g. the color of the light blue border around the "Click" button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

## Other Browser Button Settings

These settings determine the colors of the buttons for users using browsers other than Internet Explorer.



- **Use Default Buttons (& Inputs)**

Checking the box for this option will apply operating system's default color settings to the buttons for non-IE browsers. When this option is enabled, the rest of the Other Browser Button Settings are disabled.

- **Background**

The color used in the background of the buttons in the Tracker pages (e.g. the blue color behind the text "Click" on the button in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

- **Text**

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Click" in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

- **Border**

The color of the border of the button in the Tracker pages (e.g. the color of the black border around the "Click" button in the

[Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

## Table Settings

Table Settings control the color preferences applied to tables present on View, Query, History, Metrics and Discussion Pages.

PRN	Action	Status	Assigned To
1	 	Reported	<u>Admin</u>
2	 	Closed	TBD
Project	Default Project		
Title	This is a sample Title		

- **Header Background**

The background color of the top line of a table (e.g. the blue color behind "PRN", "Action", "Status", "Assigned To" "Project" and "Title" in the [Table Settings Sample](#)). This also sets the background color behind the field names (left column) on the [View Page](#) (e.g. the color behind the text "Project" and "Title" in the [Table Settings Sample](#)).

- **Header Text**

The color of the text in the top line of a table (e.g. the color of the text "PRN", "Action", "Status", "Assigned To" "Project" and "Title" in the [Table Settings Sample](#)). This also sets the color of the text of the field names (left column) on the [View Page](#) (e.g. the color of the text "Project" and "Title" in the [Table Settings Sample](#)).

- **Odd Row Background**

The background color of each odd numbered row in a table (e.g. the background color of the row that starts with "1" in the [Table Settings Sample](#)). This also sets the background color behind the field values (right column) on the [View Page](#) (e.g. the color behind the text "Default Project" and "This is a sample Title" in the [Table Settings Sample](#)).

- **Odd Row Text**

The color of the text displayed in each odd numbered row in a table (e.g. the color of the text "1", "Reported" and "Admin" in the [Table Settings Sample](#)). This also sets the color of the text of the field values (right column) on the [View Page](#) (e.g. the color of the text "Default Project" and "This is a sample Title" in the [Table Settings Sample](#)).

- **Even Row Background**

The background color of each even numbered row in a table (e.g. the background color of the row that starts with "2" in the [Table Settings Sample](#)).

- **Even Row Text**

The color of the text displayed in each even numbered row in a table (e.g. the color of the text "2", "Closed" and "TBD" in the [Table Settings Sample](#)).

- **Border**

The color of the border around a table (e.g. the color of the border around both tables in the [Table Settings Sample](#)).

## Login Page Settings

The Login Page settings are available for customizing the color of the Login Page and Self Registration Page (if applicable).

- **Page Background**

The background color of the area behind the Login box (e.g. the white area behind the Login box in the [Login Page Sample](#)).

- **Header Gradient**

Select a method for applying a gradient effect to the Header color (e.g. "Bottom to Top" is the method selected in the area behind the text "NetResults Tracker" in the [Login Page Sample](#)). Selecting "None" will not apply the gradient effect to the Header color. This effect is only supported in Internet Explorer.

- **Header Background**

The background color of the top section of the Login box (e.g. the blue color behind the text "NetResults Tracker" in the [Login Page Sample](#)).

- **Header Text**

The color of the text in the top section of the Login box (e.g. the color of the text "NetResults Tracker" in the [Login Page Sample](#)).

- **Body Background**

The background color of the Login box (e.g. the white color behind the text "Enter your ID & password.", "User ID" and "Password" in the [Login Page Sample](#)).

- **Body Text**

The color of the text in the Login box (e.g. the color of the text "Enter your ID & password.", "User ID" and "Password" in the [Login Page Sample](#)).

- **Border**

The color of the border of the Login box (e.g. the color of the border around the Login box in the [Login Page Sample](#)).

---

## Home Page Settings

The Home Page Settings are available for customizing the color preferences for the Home Page reports.

### Home Page Settings

Welcome Admin [Preferences](#)

PRN	Action	Status	Assigned To
1	 	Reported	<a href="#">Admin</a>
2	 	Closed	TBD
3	 	Fixed	<a href="#">QA One</a>
4	 	Scheduled	<a href="#">Admin</a>

PRN	Action	Status	Assigned To
1	 	Reported	<a href="#">Admin</a>
2	 	Closed	TBD
3	 	Fixed	<a href="#">QA One</a>
4	 	Scheduled	<a href="#">Admin</a>

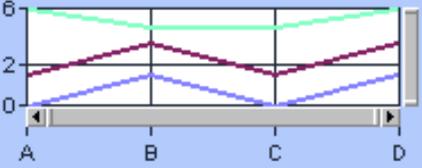
  

PRN	Action	Status	Assigned To
1	 	Reported	<a href="#">Admin</a>
2	 	Closed	TBD
3	 	Fixed	<a href="#">QA One</a>
4	 	Scheduled	<a href="#">Admin</a>

### Home Page Chart Settings

Sample Chart



- **Report 1 - Header Background**

The background color for the header of the first Home Page report (e.g. the blue background color behind the text "PRN", "Action" "Status" and "Assigned To" in the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Header Text**

The color of the text in the header of the first Home Page report (e.g. the color of the text "PRN", "Action" "Status" and "Assigned To" in the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Odd Row Background**

The background color of odd-numbered rows in the first Home Page report (e.g. the white background color of the row that starts with "1" in first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Odd Row Text**

The color of the text in the odd-numbered rows in the first Home Page report (e.g. the color of the text "1", "Reported" and "Admin" in the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Even Row Background**

The background color of even-numbered rows in the first Home Page report (e.g. the background color of the row that starts with "2" in the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Even Row Text**

The color of the text in the even-numbered rows in the first Home Page report (e.g. the color of the text "2", "Closed" and "TBD" in the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 1 - Border**

The color of the border around the first Home Page report (e.g. the blue color of the border around the first (top) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Header Background**

The background color of the header of the second Home Page report (e.g. the silver background color behind the text "PRN", "Action", "Status" and "Assigned To" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Header Text**

The color of the text of the header in the second Home Page report (e.g. the color of the text "PRN", "Action", "Status" and "Assigned To" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Odd Row Background**

The background color of odd-numbered rows in the second Home Page report (e.g. the background color of the row that starts with "1" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Odd Row Text**

The color of the text in the odd-numbered rows in the second Home Page report (e.g. the background color of the text "1", "Reported" and "Admin" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Even Row Background**

The background color of even-numbered rows in the second Home Page report (e.g. the background color of the row that starts with "2" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Even Row Text**

The color of the text in the even-numbered rows in the second Home Page report (e.g. the color of the text "2", "Closed" and "TBD" in the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 2 - Border**

The color of the border around the second Home Page report (e.g. the silver color of the border around the second (middle) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Header Background**

The background color of the header of the third Home Page report (e.g. the green background color behind the text "PRN", "Action", "Status" and "Assigned To" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Header Text**

The color of the text in the header of the third Home Page report (e.g. the color of the text "PRN", "Action", "Status" and "Assigned To" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Odd Row Background**

The background color of odd-numbered rows in the third Home Page report (e.g. the background color of the row that starts with "1" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Odd Row Text**

The color of the text in the odd-numbered rows in the third Home Page report (e.g. the color of the text "1", "Reported" and "Admin" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Even Row Background**

The background color of even-numbered rows in the third Home Page report (e.g. the background color of the row that starts with "2" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Even Row Text**

The color of the text in the even-numbered rows in the third Home Page report (e.g. the color of the text "2", "Closed" and "TBD" in the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Report 3 - Border**

The color of the border around the third Home Page report (e.g. the green color of the border around the third (bottom) Home Page report in the [Home Page Settings Sample](#)).

- **Chart Background**

The background color when a chart is displayed on the Home Page. "<Transparent>" is available as a selection, indicating that the Chart Background Color will be the Header Background Color for Report 1, 2 or 3 (the position on the Home Page in which the chart is selected). In the [Home Page Settings Sample](#), <Transparent> is selected.

- **Chart Foreground**

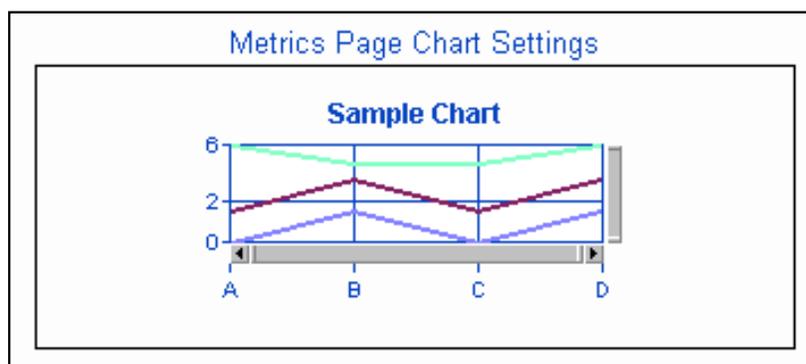
The color of the text and foreground of a Home Page chart (e.g. x-axis and y-axis labels, chart title, gridlines, legend text). "<Text Color>" is available as a selection, indicating that the Chart Foreground Color will be the Header Text Color for Report 1, 2 or 3 (the position on the Home Page in which the Chart is selected). In the [Home Page Settings Sample](#), <Text Color> is selected.

- **Chart Grid Background**

The background color of the grid on bar and line charts displayed on the Home Page. "<Transparent>" is available as a selection, indicating that the Chart Background Color will be the Header Background Color for Report 1, 2 or 3 (the position on the Home Page in which the chart is selected). In the [Home Page Settings Sample](#), the Chart Grid Background is white.

## Metrics Page Chart Settings

Metrics Page Chart Settings determine the color preferences for charts displayed in the Metrics Page.



- **Background**

The background color of a chart. "<Transparent>" is available as a selection, indicating that the Background Color will be the Page Background Color as set in the [General Settings](#) section. In the [Metrics Page Settings Sample](#), <Transparent> is selected.

- **Foreground**

The color of the text and foreground of a chart (e.g. x-axis and y-axis labels, chart title, gridlines, legend text). "<Text Color>" is available as a selection, indicating that the Foreground Color will be the Page Text (Field Labels) Color as set in the [General Settings](#) section. In the [Metrics Page Settings Sample](#), <Text Color> is selected.

- **Grid Background**

The background color of the grid on bar and line charts. "<Transparent>" is available as a selection, indicating that the Chart Background Color will be the Page Background Color as set in the [General Settings](#) section. In the [Metrics Page Settings Sample](#), the Chart Grid Background is white.

---

## Admin Table Settings

Admin Table Settings determine the color settings for tables displayed in the Admin section (e.g. the list of fields in the [Manage Fields](#) section, the list of users in the [User Administration](#) section).

Option	Company	User ID
Edit	Company 1	Admin
Edit	Company 2	dev_mgr

- **Header Section Background**

The background color of the top row for tables displayed in the Admin section pages (e.g. the blue background color behind the text "Option", "Company" and "User ID" in the [Admin Table Settings Sample](#)).

- **Header Section Text**

The color of the text in the top row for tables displayed in the Admin section pages (e.g. the color of the text "Option", "Company" and "User ID" in the [Admin Table Settings Sample](#)).

- **Left/Button Pane Background**

The white background color of the left pane in the tables displayed in the Admin section pages (e.g. the background color behind the "Edit" buttons in the [Admin Table Settings Sample](#)).

- **Right Pane Background**

The background color of the right pane in the tables displayed in the Admin section pages (e.g. the white background color behind the text "Company 1", "Company 2", "Admin" and "dev\_mgr" in the [Admin Table Settings Sample](#)).

- **Right Pane Text**

The color of the text in the right pane in the tables displayed in the Admin section pages (e.g. the color of the text "Company 1", "Company 2", "Admin" and "dev\_mgr" in the [Admin Table Settings Sample](#)).

- **Border**

The color of the border around the tables displayed in the Admin section pages (e.g. the blue color of the border around the table in the [Admin Table Settings Sample](#)).

---

## Color Preferences for other Features

The color preferences for the following features can be found in other sections:

[Submit via Web for Unregistered Users Knowledge Base](#)

## The Login Page

Tracker requires that all users first log into the system via a Login page. This page presents the user with a form with a User ID and password field. You can customize the top and bottom of this page with custom HTML and can set your own color scheme. This allows you to visually integrate Tracker with your company's Intranet look and feel or to provide users with information or an instructional message before logging in.

## Customizing the Login Page

To customize the Login Page:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Login Options** button
4. Customize the Login Page properties as desired. A detailed description of each can be found in the [Login Page Settings](#) sections.
5. Click **OK** to save the changes

The screenshot shows a Microsoft Internet Explorer window titled "Product Development Tracker (pteval) - Microsoft Internet Explorer". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The main content area displays a login form with the following elements:

- Product Development Tracker** (header)
- Please enter your ID and password.** (instruction)
- User ID:
- Password:
- Remember Password
- 
- [Forgot your Password?](#)
- [New User? Register Here](#)
- Powered by [NetResults Tracker](#)



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## Login Page Settings

### Header Text

Enter text to be displayed at the top of the Login box (e.g. the header text in the [Login Page Sample](#) is "Tracker Login").

### Instruction Text

Enter text to be displayed as instructions above the **User ID** and **Password** fields (e.g. the instruction text in the [Login Page Sample](#) is "Please enter your User ID"). Up to 255 characters can be entered for the Instruction Text. Only the first 25 characters of the instruction text will be displayed in the preview.

### Enable Remember Password

Enabling the Remember Password feature will display an option called "Remember Password" on the Login Page or in the user's [Preferences](#) page. Checking the box for this option will set a user's browser to remember their password. When Remember Password is enabled for a user, the password field is automatically filled in when the user browses to the Login Page.

### Enable Reset Password

Selecting "Yes" for this option will allow users to reset their password if it has been forgotten without intervention by a Tracker Administrator using the **Forgot Your Password?** link on the Tracker Login Page. When enabling this feature, please advise your users that they will need to set up a security question and answer in the [Preferences](#) section in order to be able to reset their password at a later time. This option cannot be used to reset the password for the "Admin" user in the workgroup.

### Enable Self-Registration

Selecting Yes for this option allows you to use the Self-Registration feature. Self registration allows end users to create their own Tracker user account without assistance from an Admin user by clicking on the **New User? Register Here** link on the Tracker Login Page. Information about use of this feature can be found in the [Self Registration](#) section.

### Custom HTML (Top of Page)

Enter your own HTML code to customize the area above the Login box. Note that all file references must be fully qualified; relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>. The custom HTML will not be displayed in the preview window.

**Custom HTML (Bottom of Page)** Enter your own HTML code to customize the area below the Login box. Note that all file references must be fully qualified; relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>. The custom HTML will not be displayed in the preview window.

---

## Self Registration

Self Registration is a feature which allows your end users to create their own Tracker user account. This is useful in environments where there is a large number of end users and it is not known which of those end users will need a user account.

When activating this feature, the Tracker Administrator selects the default license type to be applied to all new user accounts created by this feature. Users can self-register provided that there are sufficient licenses available to create the new user accounts. When the license limit is reached, users will be prompted that they cannot self-register and should contact their Tracker Administrator.

To self register, a user browses to the Tracker Login Page and clicks on the "New User? Register Here" link. The user will be required to provide some information to create a user account. After the user account has been created, the user is directed back to the Login Page to enter the User ID and password of their new account. This new account is added to the [User Administration](#) section.

The screenshot shows a Microsoft Internet Explorer browser window with the title bar 'Product Development Tracker (pteval) - Self Registration - Microsoft Internet Explorer'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The main content area displays a form titled 'Self Registration - Enter User Details'. A blue note at the top of the form reads: 'Note: Enter user details and click Register to access the workgroup. User ID, Password, Last Name or First Name, and Email are required fields.' Below the note are several input fields: 'User ID', 'Password', 'Confirm Password', 'Last Name', 'First Name', 'Email', 'Company', 'Phone', 'Fax', 'Address 1', 'Address 2', 'City', 'State / Province', 'Zip / Pincode', 'Country', and 'Comment'. At the bottom of the form are two buttons: 'Register' and 'Cancel'.

**Self Registration - Enter User Details**

**Note:** Enter user details and click Register to access the workgroup. User ID, Password, Last Name or First Name, and Email are required fields.

User ID

Password

Confirm Password

Last Name

First Name

Email

Company

Phone

Fax

Address 1

Address 2

City

State / Province

Zip / Pincode

Country

Comment

## Enabling Self Registration

The following steps are required to enable the Self Registration feature:

**Enable the Self Registration feature in the Login Options section**

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Login Options** button
4. Set the option **Enable Self Registration** to "Yes"
5. Click **OK** to save the change

### Set Options for Self Registered Accounts

You can make selections for the license type, user type, and user group of self-registered user accounts as well as provide instructions for end users and add custom HTML to be displayed at the top and bottom of the Self Registration form filled out by your end users.

To set the options related to the Self Registration form:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Login Options** button
4. Make selections for the options available:
  - When selecting a **User License Type**, you must have the corresponding license key entered into the [License Manager](#). In addition, you should ensure that you have not reached the maximum number of user accounts allowed for the license type selected as this will prevent users from being able to self-register. For a current snapshot of the total user accounts configured in your installation, please check the [User Management System Home Page](#). Definitions of the license types are available in [User Administration](#) section.
  - Select a [User Group](#) to which the self registered user accounts will be added as members. Adding self registered users to a particular user group will grant them all of the [privileges](#) enabled for the user group selected.

If you selected Static or Floating as the User License Type:

- You can select a Standard or Restricted user group for this field
- If you select a user group other than "Users" for this field, the self registered accounts will also be added to the Users group by default

If you selected Restricted as the User License Type:

- You can only select a Restricted user group for this field
- If you select a user group other than "RestrictedUsers" for this field, the self registered accounts will also be added to the RestrictedUsers group by default.

- Enter text into the **Header Text** field to be displayed at the top of the Self Registration form.
- Enter information into the **Instruction HTML** field to guide the end users about how to use the Self Registration form. The following text is entered by default:

"<B>Note: </B> Enter user details and click Register to access the workgroup.<BR> User ID, Password, Last Name or First Name and Email are required fields."

- Enter your own HTML code into the **Custom HTML (Top of Page)** field to customize the area above the Self Registration form. Note that all file references must be fully qualified, relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.
- Enter your own HTML code into the **Custom HTML (Bottom of Page)** field to customize the area below the Self Registration form. Note that all file references must be fully qualified, relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.

5. Click **OK** to save your selections

### Self Registration by End Users

To self-register, an end user should use the steps listed in the [Self Registration](#) section of the User Help Guide.

### **Administer Self-Registered Accounts**

After a user has self-registered, the new account will be displayed in the [User Administration](#) section.

**NetResults Tracker** Help Topics << >>

After logging in, each user is presented with their home page. By default, this page displays a report displaying the records assigned to the user and the records reported by the user.

**NetResults Tracker (pteval) - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Home Query Task Add Edit View Delete Metrics History Logoff Help

Status Personal Preferences Updated

Powered by **NetResults Tracker Version 6.0.0**

**Welcome Developer One** 11/22/2006 10:22:13 AM [UTC-0800] [Account Info](#) | [Preferences](#)

Tracker will be upgraded to the latest version over the weekend. You will receive an email with a list of new features on Friday.

**Assigned To Me [Users]** 3 records [Print](#) | [Export](#) Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority	Total Time
16		Our Browser	Java Virtual Machine buggy	QA One	In Development	Bug	2	0.0
14		Our Browser	Add URL completion to browser	QA Manager	In Development	Enhancement	2	1.5
6		Our Paint Program	Add photo filtering option	Development Manager	In Development	Enhancement	1	0.0

**Reported By Me [Users]** 2 records [Print](#) | [Export](#) Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
1		Our Spreadsheet	Cell Resize problem	TBD	Released	04/26/2005 12:56:54 PM	3.0.4.None	Bug	3.1.None.None
0		Our Spreadsheet	4GL doesn't remember screen position	TBD	Closed	04/26/2005 12:25:04 PM	3.0.3.None	Bug	None.None.None.None

**Project Status (Default) [Users]** [Print](#) | [Export](#)

**Current Status Totals**

Status	Percentage
In Development	20%
Reported	16%
In Test	16%
Closed	8%
Deferred	8%
Duplicate	4%
Fixed	4%
In Development	4%
Released	12%
Scheduled	8%
Tested	8%

**Home Page Reports**

The Tracker Home Page displays reports generated by saved queries or charts. Any saved query or saved chart can be displayed on the Home Page. The saved queries and charts that can be displayed for each particular user depend on the user type (non-Restricted or Restricted) and on the user's group membership.

Up to three reports can be displayed on the Home Page. The **results** of each report are generated by the saved query or saved chart selected. The **format** of each report (e.g. column headings, sort order, chart properties) is determined by the saved report layout or saved chart layout associated with the saved query or chart selected.

By default in most Tracker templates, the following saved group queries are displayed on the Home Page:

#### For non-Restricted users

- The First Home Page Report is called "Assigned To Me" and is generated by a saved group query called "Assigned To Me [Users]". This saved group query is accessible to all non-Restricted users and returns all records assigned to the user currently logged into Tracker. The saved report layout associated with this report is called "Home Report 1 [Users]".
- The Second Home Page Report is called "Reported By Me" and is generated by a saved group query called "Reported By Me [Users]". This saved group query is accessible to all non-Restricted users and returns all records added by the user currently logged into Tracker. The saved report layout associated with this report is called "Home Report 2 [Users]".

#### For Restricted users

The First Home Page Report is called "Added By Me [RestrictedUsers]". The saved report layout associated with this saved query is "Added By Me [RestrictedUsers]".

### Customizing the Home Page

The following elements of the Home Page reports can be customized. Click on one of the items listed below to see details:

- [Saved queries or charts selected for each of three Home Page reports](#)
- [Criteria used to generate a particular saved query or chart](#)
- [Layout associated with a saved query or chart](#)

#### Selecting a Saved Query or Chart for one of the Home Page Reports

To temporarily select a different saved query or chart to be displayed for any of the Home Page reports while you are logged in, you can click on the pulldown menu displayed at the top of one of the Home Page reports. All personal and group saved queries and / or saved charts to which you have access will be displayed in the pulldown.

To select a different saved query or chart to be displayed for any of the Home Page reports by default when you log in, you can select the reports by clicking on the Personal Preferences link in the upper right corner of the Home Page. In the Personal Preferences page, scroll down to the Report Settings section. Select one of the saved queries or saved charts listed in the pulldown menu for either the First, Second, or Third Home Page Report fields. Click OK to save your selection. You also have the option to select "<No Report>" for the Second and Third Home Page Report fields.

To set the Home Page reports to be displayed by default when any new user accounts are added to the workgroup, set the First, Second, and Third Home Page Report fields in the [User Preferences](#) section.

You also have the option of creating your own saved query or saved chart to be used as one of the Home Page reports. Instructions for creating a new saved query can be found in the [Using Saved Queries & Reports](#) Help section. Steps for creating a new saved chart can be found in the [Metrics](#) Help section.

#### Changing the criteria used to generate a Saved Query or Saved Chart displayed as one of the Home Page Reports

To modify the criteria in a Saved Query, review the information in the section [Edit a Saved Query](#). To modify the criteria in a Saved Chart, review the information in the section [Edit a Saved Chart](#) section.

When a Saved Query is selected as one of the Home Page Report, the way this report is displayed (columns, field order, sort order) on the Home Page is based on the settings of the saved report layout associated with the Saved Query selected. You can either choose a different report layout to be associated with a Saved Query or you can edit the report layout already associated with a Saved Query. For information on either of these options, please review the [Saved Reports](#) section.

Similarly for the Saved Charts, each Saved Chart has a Chart Layout associated. You can choose a different chart layout or edit an existing chart layout to change the chart's formats (e.g. whether it is a bar chart or pie chart, whether it has a legend, etc.). Information on Chart Layouts can be found in the [Metrics](#) section.

## Overview

For various reasons you may wish to permanently remove records from the Tracker database. There are a few ways this can be done. First, you can remove all records. This is typically done when you finish an evaluation. Or, you can selectively delete some records that match certain criteria. This is done when you wish to remove records related to an old project or obsolete release. Each method is described in detail below.

## Delete Records via the Maintenance Option

**Caution: This operation is permanent. It cannot be undone. Please make a backup of your database prior to performing this operation.**

While this operation will remove all records, attachments, and history, it will leave other Tracker configuration unchanged (customized fields, option menus, workflow, users, user groups, email configuration, etc.).

This operation is typically used at the end of an evaluation to remove all test records.

To delete all records as well as all attachments and all record history:

1. Login to the [workgroup](#) as Admin
2. Click the **Admin** icon in the button bar
3. Click on the **Maintenance** button
4. Click on the **Delete Records** button
5. Choose the radio button for one of the options below to select which records should be permanently deleted from the workgroup:

### Delete <option> records

This option allows you to delete all records or delete only those records that were added using a certain form. Choosing the pulldown item "<all forms>" for this option will permanently delete all records. Choosing the pulldown item "<all> <Form Name> form" will permanently delete the records that were added using the selected form. The forms listed are the forms that have been created in the [Manage Forms](#) section.

### Delete <option> records with History Date on or After <date> and Before <date>

This option allows you to delete all records that contain an entry in the [Record History](#) with a date within a certain range.

Choosing the pulldown item "<all forms>" for this option will permanently delete all records that contain a History entry within the selected date range. Choosing the pulldown item "<all> <Form Name> form" will permanently delete the records that were added using the selected form that contain a History entry within the selected date range. The forms listed are the forms that have been created in the [Manage Forms](#) section.

You can click on the calendar icon to select a date or you can manually enter a date in the appropriate format (e.g. "mm/dd/yyyy HH:MM:SS AM/PM" or the date & time format selected in the [Preferences](#) section.). The time component is optional. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click **Now** to set the date field to be the current date and time. click **Set Time** if you wish to include the current time information in the field. Click on **Exclude Time** if you want to exclude the time information from being included in the date field. Click **OK** to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in **red** are non-business days according to the **Business Days** option in the [Preferences](#) section. Click **Cancel** to dismiss the calendar without saving changes.

### Delete <Form Name> records with PRN <operator> <PRN>

This option allows you to permanently delete records created using a certain form that have particular PRN or a PRN in a selected range. The forms listed are the forms that have been created in the [Manage Forms](#) section. Select "=" to select a particular PRN to be deleted or select one of the other operators to specify a range of PRNs to be permanently deleted. For example, selecting "Delete **Record Form** records with PRN <= 20" will permanently delete all records from PRN 0-20 where "0" is the First Record Number specified for the form in the [Manage Forms](#) section.

6. Click on the **OK** button to proceed with permanently deleting the selected records. Click **OK** when prompted to confirm the operation. Click **OK** when a confirmation page is displayed to reflect the operation is complete.

Once this operation is complete, newly added records will start with the **First Record Number** specified for each form in the [Manage Forms](#) section.

**Maintenance - Delete Records Permanently**

This operation will **permanently** delete the records (based on the criteria selected below) and **cannot be undone**. Before doing this operation, please make sure that you have made a backup of your database.

OK

Cancel

 Delete  records

 Delete  records with History Date on or After  and Before 
 Delete  records with PRN 

OK

Cancel

**Selectively Delete Records via the Query Page**

**Caution: This operation is permanent. It cannot be undone. Please make a backup of your database prior to performing this operation.**

This operation will delete the records that match certain criteria as well as the attachments to those records. It will also delete all record history associated with those records, except for one history entry (per deleted record) which is created to indicate when (and by which user) the records were deleted. This operation can be used to remove all "closed" records or records from an old release or project that has been completed.

To selectively delete some records please follow the instructions below.

1. Login to the [workgroup](#) as Admin
2. You may need to configure your system (at least temporarily) to allow this operation (as by default it is disabled).
  - o The option **Remove Records from Database on 'Delete' Operation** in the [General Preferences](#) page should be set to "Yes" (by default it is set to No). This will make the change permanent (data will be deleted from the database).
  - o The user you are logged in as (e.g. Admin) must be a member of at least one User Group that has the "Edit Query Result Set" [privilege](#). Verify that the Admins group has the Edit Query Result Set privilege (by default it does). This will allow you to perform an operation (in this case Delete) on all records that match a Query.
  - o The user you are logged in as (e.g. Admin) must be a member of at least one User Group that has the "Delete" [privilege](#). Verify that Admins group has the Delete privilege (by default it does). This will allow you to delete records.
3. Click the **Query** icon in the button bar.
4. Enter the criteria for the records you wish to delete and click on the **Run Query** button
5. On the query results page, click the **Delete Records** button.
6. Click **OK** for the confirmation dialog and ALL the records matching the current query will be deleted permanently from the database. Note: Even though only the first page of records is displayed, the Delete Records operation will delete all the records returned by the query. The total number of records returned by the current query will be displayed in the status area just below the button bar.
7. If you changed the **Remove Records from Database on 'Delete' Operation** to "Yes", you may wish to change it back to No so that any other Delete operations are not permanent.

NetResults Tracker (pteval) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Powered by NetResults Tracker Version 6.0.0

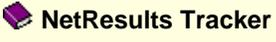
Status 17 records matched the current query [Help](#)

Query Results    [Print](#) | [Export](#) | [Edit Records](#) | [Delete Records](#)

Page 1 of 1

PRN	Action	Product	Status	Title	Date Reported	Assigned To	Request Type	Total Time
0		Our Spreadsheet	Closed	4GL doesn't remember screen position	04/26/2005 12:25:04 PM	TBD	Bug	0.0
1		Our Spreadsheet	Released	Cell Resize problem	04/26/2005 12:56:54 PM	TBD	Bug	2.5
2		Our Spreadsheet	Released	Floating point calculations are not accurate	04/26/2005 12:58:01 PM	TBD	Bug	3.5
3		Our Spreadsheet	Tested	Annoying flash on recalc	04/26/2005 12:58:35 PM	<a href="#">Build Manager</a>	Bug	1.5
4		Our Spreadsheet	In Test	Add new spreadsheet wizard	04/26/2005 12:59:19 PM	<a href="#">QA Two</a>	Enhancement	16.5
5		Our Database	Deferred	Default font is too small	04/26/2005 01:00:05 PM	<a href="#">Process Manager</a>	Bug	0.0
6		Our Paint Program	In Development	Add photo filtering option	04/26/2005 01:00:59 PM	<a href="#">Developer One</a>	Enhancement	0.0
7		Our Browser	Fixed	SQL escapes are incorrect	04/26/2005 01:01:30 PM	<a href="#">QA Manager</a>	Bug	3.5
8		Our Paint Program	Reported	Add support for gif file types	04/26/2005 01:02:06 PM	<a href="#">Process Manager</a>	Enhancement	0.0
9		Our Browser	In Test	I found a problem in the browser, doesn't keep history correctly	04/26/2005 01:05:37 PM	<a href="#">QA One</a>	Bug	0.5
10		Our Paint Program	In Test	Window tile operation covers window control bar	04/26/2005 01:06:41 PM	<a href="#">QA Two</a>	Bug	0.5
11		Our Browser	Duplicate	History is missing recent entries	04/26/2005 01:07:15 PM	TBD	Bug	0.0
12		Our Browser	Fixed	Treat &nbsp; the same as &nbsp;	04/26/2005 01:08:11 PM	<a href="#">QA Manager</a>	Enhancement	4.5
13		Our Spreadsheet	In Test	Tab traversal is not in sequence	04/26/2005 01:08:42 PM	<a href="#">QA One</a>	Bug	1.0
14		Our Browser	In Development	Add URL completion to browser	04/26/2005 01:09:31 PM	<a href="#">Developer One</a>	Enhancement	1.5
15		Our Browser	Scheduled	Can't handle a frameset with only one frame	04/26/2005 01:10:33 PM	<a href="#">Development Manager</a>	Bug	0.0
16		Our Browser	In Development	Java Virtual Machine buggy	04/26/2005 01:11:20 PM	<a href="#">Developer One</a>	Bug	0.0

Page 1 of 1

		
<b>Source Code Control Integration</b>		<a href="#">Help Topics</a>
		<a href="#">&lt;&lt;</a>
		<a href="#">&gt;&gt;</a>

## Overview and Requirements

Source Code Control Integration allows you to associate source code files to problem records within your Tracker database. This is useful in order to denote which source code files were changed during the course of processing a problem record.

Additionally, Tracker allows you to note the version of the source code file where a problem was found, and subsequently, fixed. This facilitates the ability to track the source code files that are affected by a particular problem or bug fix.

Source Code Files		1 Files		
Operations	File	Project	Problem Version	Fixed Version
 	frmComment.frm	\$/PROJECT1/Project11/Project111/	 2.2	 2.3.1

The Source Code Control Interface within Tracker has the ability to compare versions of a source code file to show the differences in the content between versions.

The history of each source code file maintained by your source code control database can be accessed via Tracker. The history information provides easy access to details related to each version of the source code file. Information such as file type, type and date of action, user who performed action, and comments about the action are displayed in the history entry for each version.

Various actions related to the Source Code Control Interface have been added as privileges, allowing you to control which functions user groups can access such as, viewing and editing the list of source code files associated with a problem record.

## Requirements for Source Code Control Integration

Microsoft Visual SourceSafe Version 6.0 (Server or Client) must be installed on the server machine where Tracker is installed. If your Microsoft Visual SourceSafe database is installed on a machine other than your Tracker server, please refer to the following Knowledge Base article for special instructions:

<http://kb.nrtracker.com/Item.asp?id=11>

For the latest information about the requirements for using Source Code Control Integration, please refer to the following page on our web site:

[http://www.nrtracker.com/pt\\_sysreq.html](http://www.nrtracker.com/pt_sysreq.html)

**Each person who uses the Source Code Control Integration feature must be a licensed user of Microsoft Visual SourceSafe. Indirect use of Microsoft Visual SourceSafe via Tracker does not release you from your legal obligations under the Microsoft Visual SourceSafe license agreement. Tracker does require that each user of source code control integration enter a Microsoft Visual SourceSafe User ID and Password. However, it is still your responsibility to ensure that all users are in full compliance with the Microsoft Visual SourceSafe license agreement. Please review your Microsoft Visual SourceSafe license agreement for details.**



## Source Code Control Options

To enable Source Code Control within Tracker:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **General Preferences** button
4. Set the following options related to Source Code Control:
  - **Enable Source Code Control Integration**  
Select Yes to enable Source Code Control Integration
  - **Source Code Control Product**  
Microsoft Visual SourceSafe Version 6.0 will appear in this section and cannot be changed
  - **Path to srcsafe.ini**  
Enter the path for the srcsafe.ini file on the server machine where Tracker is installed. Alternatively, if you click on the **Find** button, the path will be detected based on your registry settings related to Microsoft Visual SourceSafe. If there is more than one Microsoft Visual SourceSafe ini file on your machine, the Find button may not detect the one that you want to use. In this case, you can type in the path of the ini file you wish to use.
  - **Path to ss.exe**  
Enter the path for the ss.exe file on the server machine where Tracker is installed. Alternatively, if you click on the **Find** button, the path will be detected based on your registry settings related to Microsoft Visual SourceSafe. If there is more than one Microsoft Visual SourceSafe ini file on your machine, the Find button may not detect the one that you want to use. In this case, you can type in the path of the ini file you wish to use.
5. Click **OK** to save the changes made to the Source Code Control Options
6. Set up the file system permissions related to Source Code Control Integration using the following Knowledge Base article:

<http://kb.nrtracker.com/Item.asp?id=11>

## Source Code Control User Privileges

In order for a user to access any information related to Source Code Control, they must be members of a group with the appropriate privileges assigned in the [User Group Privileges](#) section. User Privileges related to Source Code Control include:

- **View Source Code List**  
Members of groups with this privilege are allowed to view the list of Source Code files associated with a record

- **Edit Source Code List**

Members of groups with this privilege are allowed to edit the Source Code List, including adding new files to be associated with a record

## Source Code Control Login Settings

Each user must supply their SourceSafe Login Settings in order to edit the source code list.

To enter the login information, each user should:

1. Login to the [workgroup](#)
2. Click on the **Preferences** link
3. In the **SourceSafe Login Settings** section, enter the **User ID** and **Password** he or she uses to access the Microsoft Visual SourceSafe database
4. Click **OK** to save these settings

## Overview

**Note: This feature is only available in NetResults Tracker Enterprise Edition.**

 Alerts are a form of email notification messages that can be triggered based on date field in a record (e.g. to remind a user about a record at a certain date and time such as "2 days after the 'Date Reported'") or triggered by a lack of change in a record's state within a certain time period (e.g. a record should not stay within a particular state for longer than 2 days. If it does stay in the state longer than 2 days, alerts are triggered).

Alerts can be configured per record. Each record can have different alert settings including when, how, how often and to whom the alerts should be sent.

Alerts can be configured based on the form that was used to submit the record, based on a selection made in a certain field or based on the workflow transition used to process the record. With the necessary privileges, users can override these alert settings during the Add or Task operations.

When configuring alerts, a fixed date and time can be entered or a date and time relative to a date field within the record can be used. In addition, alerts can be sent once or configured to repeat periodically. Any combination of users and / or user groups can receive alerts for a particular record.

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## Enabling the Alerts Feature

Performing the following steps will allow you to enable the Alerts feature in your workgroup:

### Enter the Alerts license key in the License Manager

You must enter a license key into the [License Manager](#) in order to use the Alerts feature.

### Enable Alerts in the General Preferences section

1. Login to the [workgroup](#) as Admin.
2. Click on the **Admin** icon in the top button bar.
3. Click on the **General Preferences** button.
4. In the "General Options" section, set **Enable Alerts Function** to "Yes".
5. Click **OK** to save this change.

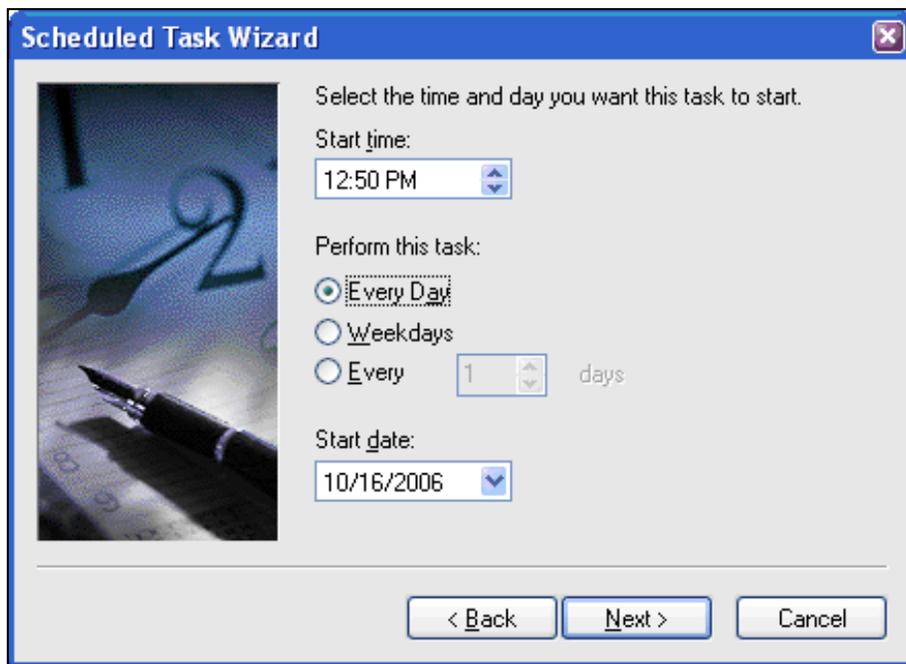
### Create a Scheduled Task for the Alerts Feature

Alerts must be configured in the Scheduled Tasks section of the Control Panel on your Tracker server. To create this scheduled task, perform the following steps:

1. Go to **Start > Settings > Control Panel** on the machine where Tracker is installed.
2. Double click on **Scheduled Tasks**.
3. Double click on **Add Scheduled Task**, then click **Next**.
4. Click on the **Browse** button, then navigate to the location you selected to for the Tracker files during the installation. By default, this location is **C:\Program Files\NetResults\Tracker**.
5. Select the file called PTAalerts.jse, then click on the **Open** button.
6. Enter a name for the scheduled task such as "Tracker Alerts", then for the option **Perform this task:**, select the radio button next to "Daily". Click **Next** to proceed.



7. The current time will be displayed as "Start Time". For the **Perform this task:** option, select "Every Day". The current date will be displayed as "Start Date". Click **Next** to continue.



8. Enter the User ID of an Administrator user (it is recommended that you use the local Administrator user). Enter and confirm the password of this user. Click **Next**.
9. The values you entered will be displayed. Check the box next to the option. **Open advanced properties for this task when I click Finish**, then click on the **Finish** button.



10. The Advanced properties will be displayed. Click on the **Task** tab. In the **Run** field, enter the following:

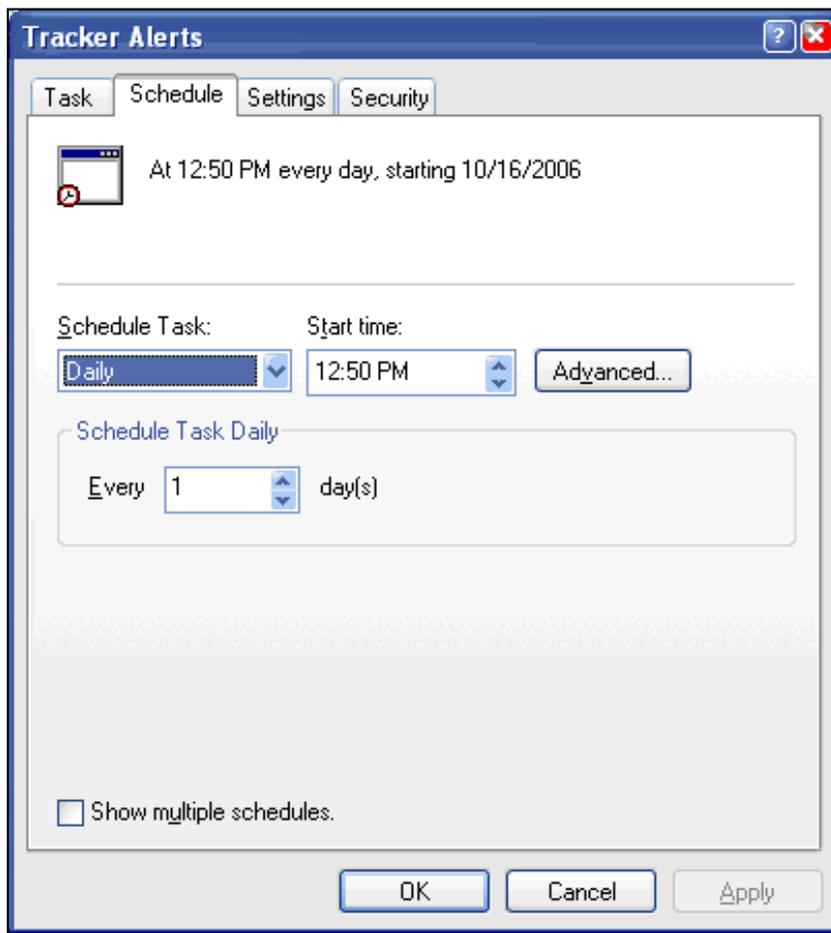
**CScript.exe "<PTAlerts.jse file path>" //B //H:CScript**

where **<PTAlerts.jse file path>** is the path where the PTAlerts.jse file resides. As mentioned above, by default, this path is **C:\Program Files\NetResults\Tracker**. Using the default path as an example, the Run field should have the following entered:

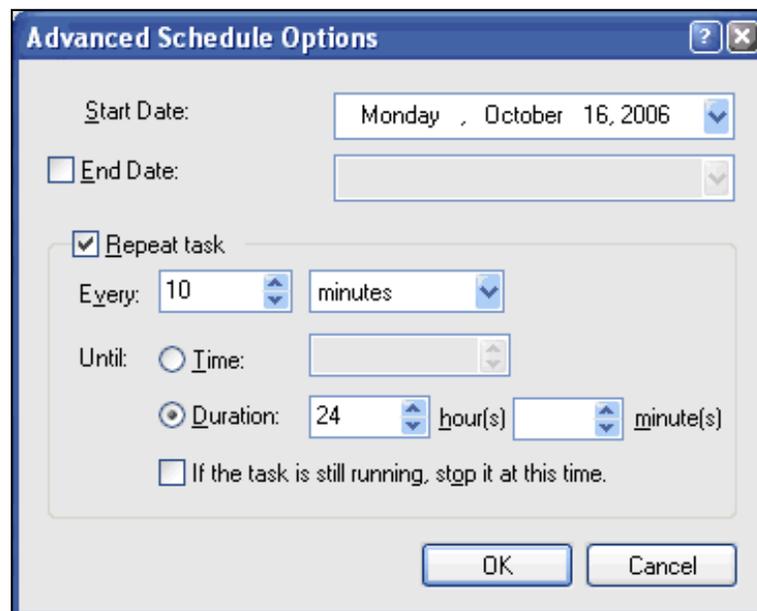
**CScript.exe "C:\Program Files\NetResults\Tracker\PTAlerts.jse" //B //H:CScript**

Please note that the PTAlerts.jse file path should be enclosed with double quotes.

11. Click on the **Schedule** tab, then click on the **Advanced** button.



12. Check the box next to **Repeat task**, then for **Every** select a length of time. We recommend using a minimum of 10 minutes. This time dictates how frequently you wish to run the Alerts Scheduled Task to check for new alerts. You can specify any repeat time you wish, but make sure that it is more than 10 minutes. For **Until** select the radio button next to "Duration". Enter "24 hours" for the "Duration". Click **OK**.



13. Click on the **Settings** tab. Check the box for the option **Stop the task if it runs for:**, then enter "0" for hours and "30" for minutes. Click **Apply**, then click **OK** to save these changes and dismiss the Properties for the Scheduled Task.

### Configure SMTP Mail Server for use with Alerts

An SMTP mail server is required to generate the alert notification messages. This can be configured in the [Email Configuration](#) section.

## Ensure an email address is entered for the users that will receive alerts

A valid email address is required for a user to receive alerts. Email addresses are entered in a user's profile in the [User Administration](#) section (if the Tracker Administrator has the appropriate privileges to edit user profile information) or in the [User Management System](#).

After enabling the Alerts feature using the steps above, configure the user group privileges and default settings for Alerts as described below.

## Alerts User Group Privileges

The following are the user group privileges related to the Alerts feature. These privileges can be set in the [User Group Privileges](#) page of the User Administration section. These privileges will only be displayed in the Privileges page if Alerts has been enabled using the steps in the section above.

- **Edit Alert Settings**  
Members of user groups with this privilege can edit the alert settings for a record
- **Edit Own Alert Settings**  
Members of user groups with this privilege can edit the alert settings for a record in which they are the Assignee.
- **View Alert Settings**  
Members of user groups with this privilege can view the alert settings for a record

## Configuring Alerts Settings during Add Operation

Alert settings for the Add operation can be configured per form. You can also configure alert settings based on the option menu item selected in a particular field on the form (e.g. Based on Product, Priority, Severity or any other pulldown you have defined). The alert settings you configure for each form can be applied automatically as records are added to the system or you can allow the end users to see and change the alert settings when they are adding a record to the system.

Alert settings for forms can be configured in the [Managing Workflows](#) section.

## Configuring Default Alert Settings for Transitions

Alert settings can be configured for each workflow transition. Alert settings can be configured for each transition such that these settings will be applied to any record processed with the transition. It is also possible to allow users to be prompted to configure the Alert settings during the Task operation.

Alert settings for transitions can be configured in the [Workflow Transitions](#) section.

## Editing Alert Settings

A user can edit the alert settings for a record if they have the required privileges. If a user is a member of a group with the [Edit Own Alerts](#) user group privilege, the user can modify the alert settings for a record in which they are the Assignee. If a user is a member of a group with the [Edit Alert Settings](#) privilege, the user can modify the alert settings for any record.

A user meeting the criteria mentioned above can edit the alert settings for a record by clicking on the Edit icon in the top button bar and entering a record number or by clicking on the Edit icon next to a record number in a report on the Query or Home page. Clicking on the Edit Alerts button will display the following alert settings for the record:

### Edit Alert Settings For Record REC0

OK Cancel

Set Alert  Yes  No

Send Alert  1 day(s) after Test Date

If Status is unchanged as of

Until this date

Repeat Options  Repeat every 1 day(s)

Stop after 3 alert(s)

Repeat forever

Send Alerts To

- <Assignee>
- <Reporter>
- <State Manager>
- [Admins]
- [Users]

Additional Information

OK Cancel

## Overview

**Note: This feature is only available in NetResults Tracker Enterprise Edition.**



The Discussions feature is a means of allowing users to discuss various topics pertaining to a record. This allows users to collaborate without having to coordinate a meeting for everyone to contribute to the discussion. For example, a record may be assigned to a particular developer, but several developers are needed to provide input for an enhancement's design or the resolution of a bug. These discussions can continue in parallel to the record's progression through the workflow.

Discussions are also useful for integrating a new user into a project. The user can review the information present in the discussion to become familiar with the project's progress to date.

A discussion can be started for any record. The user initiating the discussion can invite other users or user groups to participate in the discussion. Within the discussion for each record, multiple threads can be started to discuss multiple topics. Users can post and reply to messages within a particular thread. Users can also choose to receive email messages to notify them about a new discussion or new posts to a discussion.

## Enabling Discussions

Performing the following steps will allow you to enable the Discussions feature in your workgroup:

### 1. Enter the Discussions key in the License Manager

You must enter a license key into the [License Manager](#) in order to use the Discussions feature.

### 2. Enable Discussions in the General Preferences section

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon in the top button bar
3. Click on the **General Preferences** button
4. In the "General Options" section, set **Enable Discussion** to "Yes"
5. Click **OK** to save this change

### 3. Configure SMTP Mail Server for use with Discussions

An SMTP mail server is only required if you wish to generate notification messages related to the discussions (for inviting users to a new discussion or notifying users when a new post has been made to the discussion). This can be configured in the [Email Configuration](#) section.

### 4. Ensure an email address is entered for the users that will receive discussion notification

## **messages**

A valid email address is only needed if you want a user to receive notification messages for discussions. Email addresses are entered in a user's profile in the [User Administration](#) section (if the Tracker Administrator has the appropriate privileges to edit user profile information) or in the [User Management System](#).

After enabling the Discussions feature using the steps above, configure the user group privileges and default settings for Discussions as described below.

## **Discussions User Group Privileges**

User group privileges related to the Discussions feature can be set in the [User Group Privileges](#) page of the User Administration section. Discussion privileges will only be displayed in the Privileges page if Discussions have been enabled using the steps in the section above.

## **Default User Preferences for Discussions**

Default user preferences can be set for the Discussions feature. These settings will be used when a new user is added to Tracker and can be configured in the [User Preferences](#) page of the Admin section.

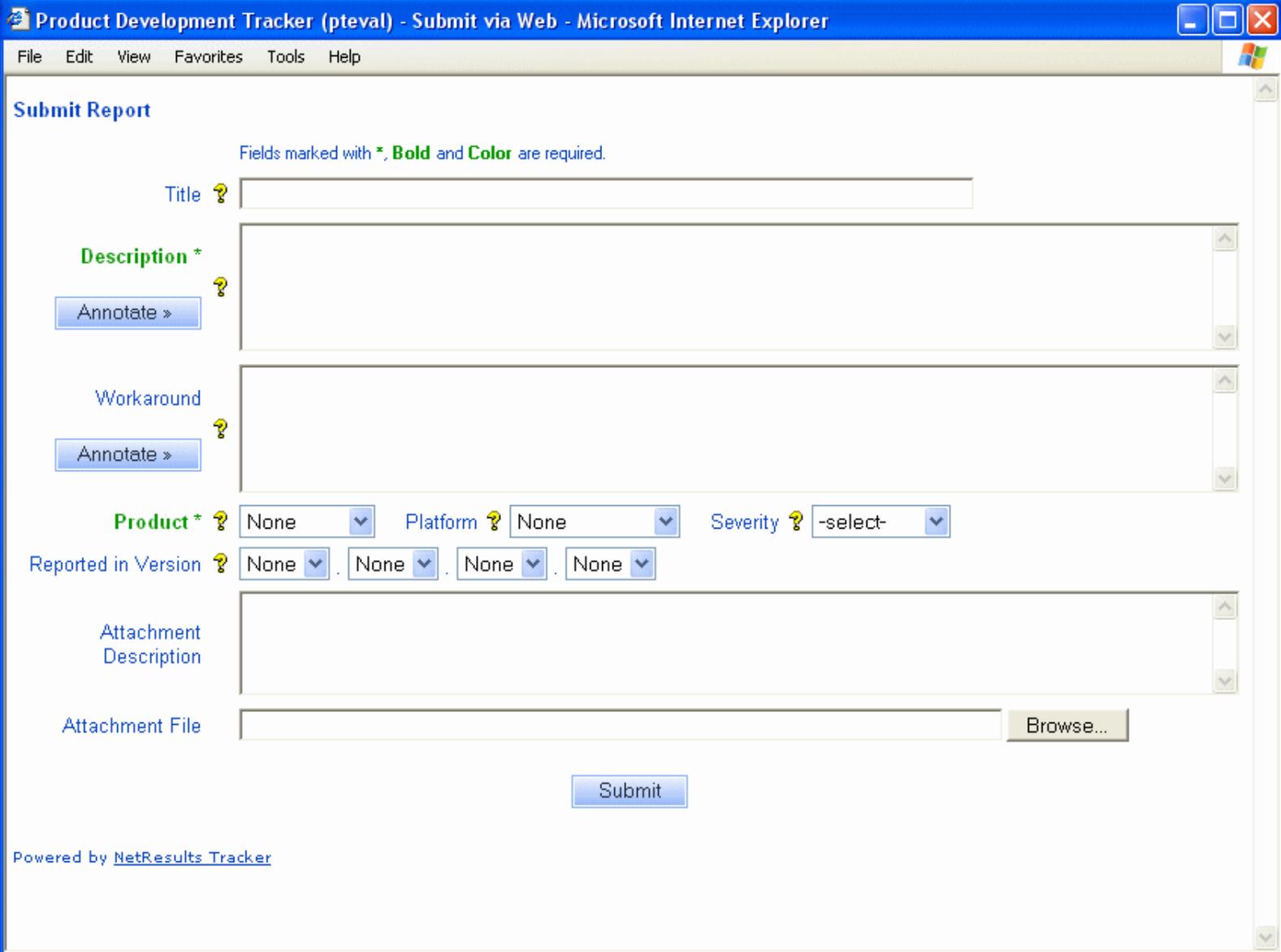
The default user preferences will determine the initial settings for these preferences. Each user can change their own settings in the [Preferences](#) page.

**Note: This feature is included in Tracker Enterprise Edition and as a separately purchased option for Tracker Standard Edition. If you have not entered the [Submit Page license key](#), this feature will not appear in your system.**

Submit via Web for Unregistered Users, also known as the Submit Page, is a form used to anonymously submit records to Tracker. After submitting a record, the user is provided with the record number of the newly added record by Tracker. The Submit Page can be used, for example, as a web based suggestion box.

A user who submits a record through the Submit page is not required to login to Tracker. However, since the user does not have a user account, they will not be identified in the record (Reported By field will be set to "Unregistered User"), cannot log in to Tracker to view the status of the issue they reported and cannot have issues assigned back to them for verification (e.g. to sign off on the resolution of the issue). To have access to those features, the user must have a Tracker user account.

A sample Submit Page is displayed below.



Product Development Tracker (pteval) - Submit via Web - Microsoft Internet Explorer

File Edit View Favorites Tools Help

### Submit Report

Fields marked with \*, **Bold** and **Color** are required.

Title ?

**Description \*** ?

Annotate »

Workaround ?

Annotate »

**Product \*** ? None  Platform ? None  Severity ? -select-

Reported in Version ? None  . None  . None  . None

Attachment Description

Attachment File  Browse...

Submit

Powered by [NetResults Tracker](#)

## Enabling the Submit Page

To set up the Submit Page for use by unregistered users, perform the following steps:

### Enter the Submit Page license key into the License Manager

You must enter a license key into the [License Manager](#) in order to use the Submit Page feature.

### Enable the Submit Page in the General Preferences section

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **General Preferences** button
4. In the **General Options** section, set **Enable Submit via Web for Unregistered Users** to "Yes"
5. Click on the **OK** button to save this change

---

### Submit Page Fields

You can customize which fields are available on the Submit Page form and which option menu items are available in each pulldown field. Browse to the Submit Page to see which fields and pulldown option menu items are currently displayed by going to

[http://servername/workgroupname/internet/user\\_add.asp](http://servername/workgroupname/internet/user_add.asp)

where **servername** is the TCP/IP host name of the machine where Tracker is installed and **workgroupname** is the name the workgroup you are trying to access. For example, to reach the workgroup called pteval installed on the server called myServer, you would browse to

[http://myServer/pteval/internet/user\\_add.asp](http://myServer/pteval/internet/user_add.asp)

To change whether a field is displayed on the Submit Page:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Edit** button to the left of the field you wish to add or remove from the Submit Page
5. To add a field to be displayed on the Submit Page, set the option **Include in Submit Page** to "Yes". To remove a field from being displayed, set this option to "No".

Check the value of the **Record Order** option for this field. This field determines the order in which the fields are displayed on the Add and Submit Pages.

Check the setting of the option **Required for Add & Submit**. If this option is set to "Yes", this field will also require a user to enter a value for this field or select a value other than the default when submitting a record via the Submit Page. Required fields can be displayed in a particular color, in bold or with a special character via the [Required Field Highlights](#) option in the General Preferences section.

For date fields, check the setting of the option **Initialize On Add**. If this option is set to "No", the date field will not be set with the current date and time by default. If this option is set to "Yes", the date field will be set with the current date and time when the record is submitted via the Submit Page. This will be done irrespective of whether the field is displayed on the Submit Page. In certain cases, it may be desirable for a date field to be initialized with the current date and time without the field being displayed on the Submit Page. For example, you may want the Date Reported to be initialized with the current date and time without allowing the user submitting the form to be able to change the value of the Date Reported field.

6. Click **OK** to save your changes

To create a new field to be displayed on the Submit Page, use the information in the [Managing Fields](#) section.

### Customize the pulldown options displayed on the Submit Page

For the pulldown fields displayed on the Submit Page, you can limit the option menu values available for selection. For example, if a pulldown field called Priority is displayed on the Submit Page and you do not want unregistered users to select the value "1", you can set the value such that it is not displayed in the Priority field on the Submit Page.

### Submit Page Option Menu Items

To set whether a pulldown option menu item is displayed on the Submit Page:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Managing Fields** button
4. Click on the **Items** button to the left of the pulldown or release number field you wish to modify
5. Click on the **Edit** button to the left of the option menu item you wish to modify. To remove an option menu item from being displayed on the Submit Page, uncheck the option **Value is Public**.
6. Click **OK** to save this change

## Customize the Submit Page Options

Various aspects of the Submit Page can be customized. You can add custom HTML to the top and bottom of the page (e.g. to add your own logo or instructions to the form). You can also customize the Page Title and Header.

To customize the Submit Page options:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Submit Page Options** button
4. Make selections for the options described below, then click **OK** to save the settings

---

## Submit Page Settings

The options in the Submit Page Settings section allow you to customize the labels on the Submit Page and enable users to upload files when submitting the form.

### Page Title

Enter up to 80 characters to be displayed as the page title in the browser. The text you enter will be displayed before the browser name (as shown by the text "Product Development Tracker (pteval) - Submit via Web" before "Microsoft Internet Explorer" in the [sample](#) image above). You can use the variable <workgroup> to include the name of the workgroup as part of the Page Title.

### Page Header

Enter up to 127 characters to be displayed as the page header on the form. The text you enter will be displayed as the first line of the form (as shown by the text "Submit Report" in the upper left corner of the [sample](#) image above).

### Page Header Alignment

Select where the Page Header (the text entered into the Page Header field above) should be displayed on the first line of the form. Selecting "Left" will display the Page Header in the upper left corner of the form. Selecting "Center" will display the Page Header in the center of the form. Selecting "Right" will display the Page Header in the upper right corner of the form. In the [sample](#) image above, the Page Header Alignment is set to Left.

### Submit Button Label

Enter up to 50 characters to be displayed on the button used to submit the Submit Page. By default, this is set to "Submit" (as shown in the [sample](#) image above). For example, you may want to change the label to "Save" or "OK" or "Complete".

### Display Field Help

Select an option with respect to displaying the field help text. Field Help is text that is customized per field to provide additional information about the purpose of the field on the form. More information on customizing the Field Help text can be found in the [Managing Fields](#) section of this Help Guide. Selecting "Yes" will display the field help icon to the left of each field that has Field Help text configured in the [Managing Fields](#) section. Selecting "No" will prevent any field help icons from being displayed on the Submit Page. Selecting "Instead of Field Labels" will display the field help text configured in the [Managing Fields](#) section as the field's label on the Submit Page (as shown in the sample below).

Product Development Tracker (pteval) - Submit via Web - Microsoft Internet Explorer

File Edit View Favorites Tools Help

### Submit Report

Enter a title for the issue being submitted

Enter the details of the issue being submitted

Enter any known workaround for the issue

Select the product related to the issue being submitted

None ▾

Select the platform related to the issue being submitted

None ▾

Select a rating to describe the severity of the issue

-select- ▾

Select the version related to the issue being submitted

None ▾ . None ▾ . None ▾ . None ▾

Submit

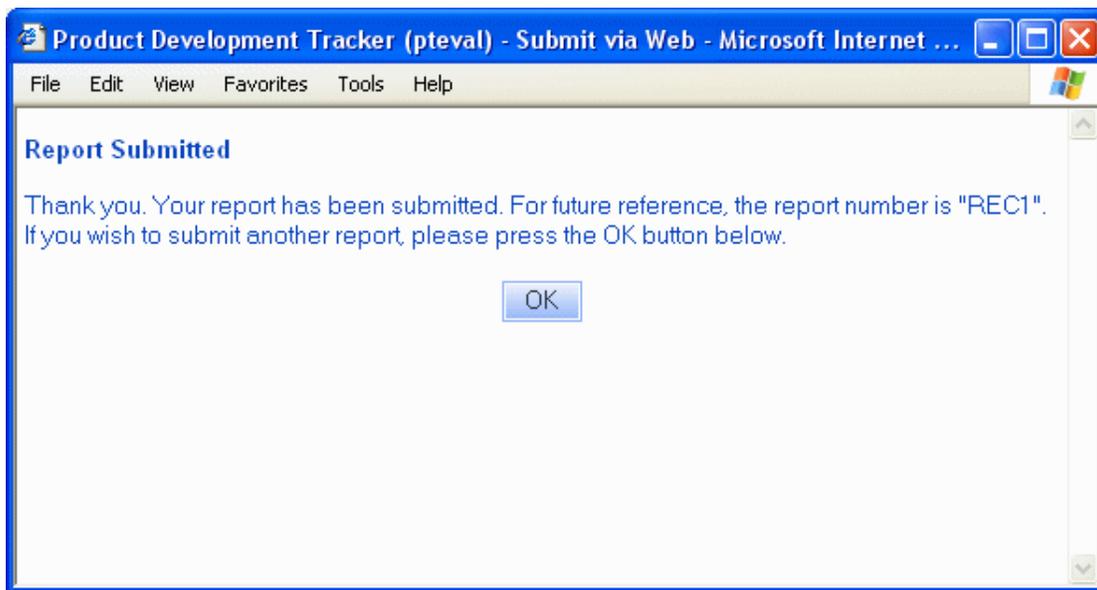
Powered by [NetResults Tracker](#)

**Enable File Attachment**

Check the box for this option if you wish to allow users to upload file attachments when submitting a record via the Submit Page.

**Confirmation Page Settings**

The options in the Confirmation Page Settings section allow you to customize the labels on the confirmation page displayed after a record is submitted using the Submit Page. A sample confirmation page is displayed below.



### Page Title

Enter up to 80 characters to be displayed as the page title in the browser. The text you enter will be displayed before the browser name (as shown by the text "Product Development Tracker (pteval) - Submit via Web" before "Microsoft Internet Explorer" in the [sample](#) image above). You can use the variable <workgroup> to include the name of the workgroup as part of the Page Title.

### Page Header

Enter up to 127 characters to be displayed as the page header on the form. The text you enter will be displayed as the first line of the form (as shown by the text "Report Submitted" in the upper left corner of the [sample](#) image above).

### Page Header Alignment

Select where the Page Header (the text entered into the Page Header field above) should be displayed on the first line of the form. Selecting "Left" will display the Page Header in the upper left corner of the form. Selecting "Center" will display the Page Header in the center of the form. Selecting "Right" will display the Page Header in the upper right corner of the form. In the [sample](#) image above, the Page Header Alignment is set to Left.

### Confirmation Message

Enter text to be displayed on the confirmation page after a user submits a record using the Submit Page. In the [sample](#) image above, the Confirmation Message is set to "Thank you. Your report has been submitted..." You can use the variable <number> if you wish to include the number (PRN) of the record submitted when the button was clicked on the Submit Page.

### Display Button

Check the box for this option if you wish to have a button displayed on the confirmation page. The button's label and action are determined by the settings selected in the **Button Label** and **Button Action** options below.

### Button Label

Enter up to 50 characters to be displayed as the label for the button on the confirmation page. In the [sample](#) image above, the button label is "OK".

### Button Action

Select an option to determine what the button on the confirmation page will do. When "Back to Submit Page" is selected, the browser will be directed back to the Submit Page when the button is clicked. Selecting the "Close Window" option will exit the browser window when the button is clicked. The Close Window option is only supported for use with Internet Explorer. When "Go To URL" is selected, the browser will be directed to the URL entered into the **Button Action URL** field below when the button is clicked.

### Button Action URL

This option will only be available when "Go To URL" is selected for the **Button Action** option above. Enter up to 255 characters for the URL where the browser should be directed upon clicking the button on the confirmation page. Be sure to enter the full URL including the protocol (e.g. "http://", "ftp://", etc.). The variable <number> can be used to represent the newly added record (PRN) as part of the Button Action URL.

---

## General Color Settings



The following color preferences can be set for the Submit Page. To change the color of an item, select a color from the pulldown or select **<Custom>** to enter the Hex code or select **<Default>** to choose the browser's default value. Hex code must be in the format "#XXXXXX".

### Page Background

The background color of the Submit Page (e.g. the white color behind the text "Submit Report" in the [Color Settings Sample](#) above).

### Page Text (Field Labels)

The color of the text on the Submit Page (e.g. the color of the text "Submit Report" and "Title" in the [Color Settings Sample](#) above).

### Required Field Label Text

The color of the text used to display the label for fields that are required on the Submit page (e.g. the green color of the text "Description\*" in the [Color Settings Sample](#) above).

### Input Background

The color displayed in the area of a field where text or information would be entered (e.g. the white color behind the text "Enhancement Request" and "A new enhancement requested" in the [Color Settings Sample](#) above).

### Input Text (Field Values)

The color of the text entered into a field (e.g. the black color of the text "Enhancement Request" and "A new enhancement requested" in the [Color Settings Sample](#) above).

## IE Browser Button Settings

These settings determine the colors of the buttons for users using the Internet Explorer (IE) browser.



### Use Default Buttons (& Inputs)

Checking the box for this option will apply the operating system's default color settings to the buttons for IE users. When this option is enabled, the rest of the IE Browser Button Settings are disabled.

### Gradient

Select a method for applying a gradient effect to the button color (e.g. "Bottom to Top" is the method selected in the [IE Browser Buttons Sample](#)). Selecting "None" will not apply the gradient effect to the button color. This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Background

The color used in the background of the buttons in the Tracker pages (e.g. the light blue color behind the text "Submit" on the button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Text

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Submit" in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Border

The color of the border of the button in the Tracker pages (e.g. the color of the light blue border around the "Submit" button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

## Other Browser Button Settings

These settings determine the colors of the buttons for users using browsers other than Internet Explorer.



### Use Default Buttons (& Inputs)

Checking the box for this option will apply operating system's default color settings to the buttons for non-IE browsers. When this option is enabled, the rest of the Other Browser Button Settings are disabled.

### Background

The color used in the background of the buttons in the Tracker pages (e.g. the blue color behind the text "Submit" on the button in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Text

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Submit" in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Border

The color of the border of the button in the Tracker pages (e.g. the color of the black border around the "Submit" button in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

---

## General Settings

The options in the General Settings section allow you to control which forms and projects are displayed and which user groups will be able to access records submitted via the Submit Page as well as add custom HTML to be used at the top and bottom of the Submit Page.

The project(s) and form(s) that should be available on the Submit Page are determined by the **User Groups** option in the [Unregistered User Options](#) section of the General Preferences page. Any projects and forms that are visible to the user group(s) selected for that option will be available on the Submit Page (the available Projects and Forms will also be displayed in the **Default Project and Form** option below). To see which user groups have visibility to a particular Project (and its respective form(s)), check the Project's [Form Visibility](#) section.

### Default Project and Form

Select the default project and form that should be displayed by default when a user browses to the Submit Page. The projects and forms available for selection are determined by the selections made in the **User Groups** option in the [Unregistered User Options](#) section of the General Preferences page.

### Custom HTML (Top of Page)

If desired, customize the top of the Submit Page by entering your own HTML code. Note that all file references must be fully qualified; relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.

### Custom HTML (Bottom of Page)

If desired, customize the bottom of the Submit Page by entering your own HTML code. Note that all file references must be fully qualified; relative paths will not work. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.

---

## Date and Time Settings for the Submit Page

Date and Time settings can be configured to applied to the Submit Page in the [Unregistered User Options](#) in the [General Preferences](#) section.

---

## Email Notification for Submit Page Users

Email notification messages can be sent to users reporting issues using the Submit Page. Designate a Text type field to collect the reporter's email address when records are submitted using the [Unregistered User Email](#) attribute and display this Text field on the Submit Page using the [Include in Submit Page](#) option in the [Managing Fields](#) section.

You can set preferences for the Date and Time settings, email content and actions that send an email notification to Submit Page users by configuring the [Unregistered User Options](#) in the [General Preferences](#) section.

---

## Using the Submit Page

Once you have enabled the Submit Page using the steps above, your users can browse to this page by going to

**[http://servername/workgroupname/internet/user\\_add.asp](http://servername/workgroupname/internet/user_add.asp)**

where **servername** is the TCP/IP host name of the machine where Tracker is installed and **workgroupname** is the name the workgroup you are trying to access. For example, to reach the workgroup called pteval installed on the server called myServer, you would browse to

**[http://myServer/pteval/internet/user\\_add.asp](http://myServer/pteval/internet/user_add.asp)**

To submit a record using the Submit Page:

1. Browse to the URL of the Submit Page
2. When the Field Help icon ( ? ) is present, you can move the cursor over the icon to see a description of the field.
3. Enter information into the fields displayed
4. Click on the **Submit** button to save the new record
5. A confirmation page will be displayed
6. A button for further action (e.g. close window, return to the Submit Page, or browse to another URL) may be displayed on the confirmation page

---

## Characteristics of Records submitted via the Submit Page

Records submitted via the Submit Page have a few differences when compared to records submitted via the Add Page:

### Reported By field

All records reported using the Submit Page are filed as having been reported by a special built-in user named **Unregistered User (Inet)** so that you can quickly identify (or search for) records reported using the Submit Page.

### Transitions where New Assignee is the Reporter

If a transition has New Assignee set to be the Reporter of a record, when this transition is selected for a record reported via the Submit page the record will be routed to the State Manager of the New State rather than the Reporter (since records cannot be assigned to the user called Unregistered User (Inet) who is listed as the Reporter). For more information about transitions, please review the [Workflow Transitions](#) section.

## Overview

The ability to add records to Tracker via an email message is available as an additional option. This feature allows your end users or customers to send an email to a POP3 or IMAP email account. One email account is required for each combination of Project and Form where this feature is to be used. Optionally, if you wish to have the incoming email settings based on each option menu item within a pulldown, an email account will be required for each option menu item. Tracker's Email Processor reads and parses the information in the email message and uses the information to create a new record.

The subject and body of the email can be saved as fields within the record created. You can also configure Tracker to attach the original email message to the record created. Some of the options include setting the status of the new record, choosing whether to map the sender's email to set the "Reported By", and sending a reply to the unmapped emails. A complete list of options can be found when configuring the [Incoming Email Settings](#) options.

The requirements and steps for enabling this feature are described in the sections below.

## Requirements for using Submit via Email

The following items are required for use of the Submit via Email feature:

### Mail Server

A POP3 or IMAP Mail Server configured with at least one user account (see below) for use by Tracker is required. Most "Internet" email accounts are POP3 or IMAP server accounts.

### User Accounts (Mailboxes)

A user account (mailbox) on a supported mail server is required for each combination of Project and Form that will use this feature. Optionally, if you wish to have incoming email settings set differently for each option menu item in a pulldown, one user account will be needed for each option menu item. If you are using multiple workgroups on the same Tracker installation, all projects where this feature will be used must have a unique user account even if the products are located in different workgroups. **Warning: Tracker will delete emails that it reads from its mailbox.** As such, if it is important that you keep a copy of all emails sent to a particular email address (e.g. support@mycompany.com), you should not configure Tracker to read directly from the mailbox for that address. Instead, you should create an email account for Tracker that receives copies (for example, via a mailing list or forward option) of all emails sent to the mission critical email account. In general, it is a good idea to set up the Tracker mailboxes as "secondary" email accounts at least until you are certain you have the Submit via Email feature configured properly.

### Mail Client

A mail client program which can send email to the Mail Server you are using and which uses (or can be configured to use) one of the supported character sets (us-ascii, iso-8859-1, windows-1252, or utf-8) is required

for each user who sends email to Tracker. Typically the mail client program will use SMTP to communicate with the mail server, though your Mail Server may support additional protocols. Most mail programs which can send email over the Internet (e.g. Microsoft Outlook Express, Netscape Mail, Microsoft Outlook, etc.) or which can send email to a server which can send email over the Internet (e.g. newer versions of Microsoft Exchange, newer versions of IBM Lotus Notes, etc.) will meet the Mail Client requirement.

The following components are required to be installed on the Tracker server machine for use of the Submit via Email feature.

### **Operating System**

Windows 2000 Server or Windows Server 2003 is required for use of the Submit via Email feature.

### **SOAP Interface**

Microsoft SOAP Toolkit 3.0 must be installed on the machine where Tracker is installed. To download this component, browse to the [Microsoft SOAP Toolkit 3.0 Download Page](#).

Microsoft WinHTTP 5.1 and Microsoft XML Core Services (MSXML) 4.0 are included when SOAP Toolkit 3.0 is installed.

### **Windows Installer**

Windows Installer 2.0 or later is required to install SOAP. If you have Windows 2000 with Service Pack 3 or newer, you already have Windows Installer 2.0 installed. When installing SOAP, you will be prompted if you do not have the appropriate Windows Installer version. To download this component if needed, browse to the [Microsoft Windows Installer 2.0 Download Page for Windows 2000](#).

### **Browser**

Internet Explorer 5.0 or newer is required for installation of Microsoft SOAP Toolkit 3.0. To download the latest version of Internet Explorer, browse to the [Microsoft Internet Explorer Download Page](#).

---

## **Enabling the Submit via Email feature**

Perform the following steps to enable this feature:

### **Enter the Email license key into the License Manager**

You must enter a license key into the [License Manager](#) in order to use this feature feature.

### **Install Required Components**

Install the required components on the Tracker server as mentioned in the [Server Requirements](#) section above.

### **Enable the Submit via Email option in General Preferences**

For each workgroup where this feature will be used

1. Login to the workgroup as Admin
2. Click on the Admin icon
3. Click on the General Preferences button

4. Set the "Enable Submit via Email" option to Yes
5. Click OK to save this change

### **Enter the Outgoing Mail Server Settings**

Configure the "Set Mail Server Configuration" section of the [Mail Server](#) used by this Tracker workgroup. If you are using other features that generate email notifications, a mail server may already be set up for your workgroup. The same mail server can be used for all features that generate email notifications.

### **Configure the Global Incoming Mail Options**

Make selections for the options related to handling the incoming messages in the [Incoming Mail](#) section of the Email Configuration page.

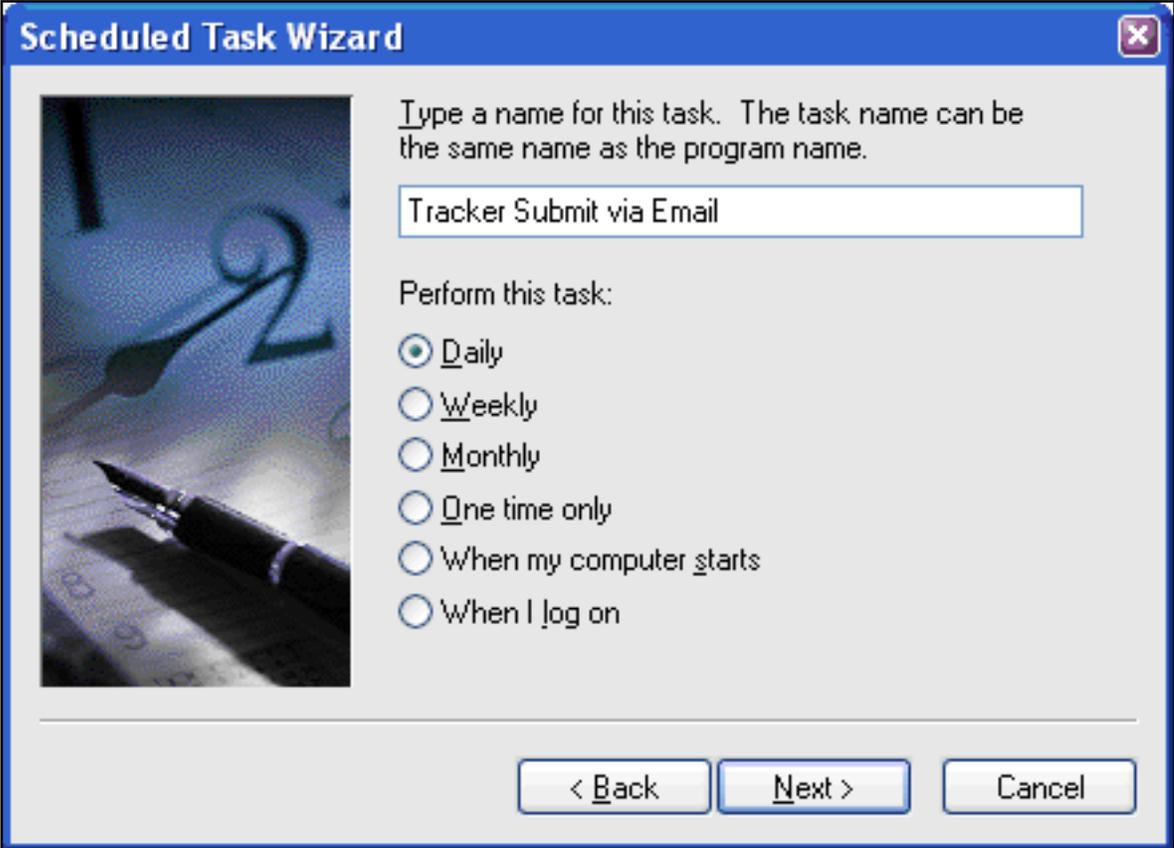
### **Configure the Incoming Email Settings for each Project**

Make selections for the options related to handling the incoming messages for each project in the [Incoming Email Settings](#) section of the Manage Projects page.

### **Create a Scheduled Task for the Submit via Email Feature**

Set up the Email Processor in the Scheduled Tasks section of the Control Panel on the machine where Tracker is installed using the steps below.

1. Go to Start > Settings > Control Panel on the machine where Tracker is installed
2. Double click on Scheduled Tasks
3. Double click on "Add Scheduled Task", then click Next
4. Click on the Browse button, then navigate to the location you selected to for the Tracker files during the installation. By default, this location is C:\Program Files\NetResults\Tracker
5. Select the file called PTEmails.jse, then click on the Open button
6. Enter a name for the scheduled task such as "Tracker Submit via Email", then for the option "Perform this task:" select the radio button next to "Daily". Click Next to proceed.



**Scheduled Task Wizard**

Type a name for this task. The task name can be the same name as the program name.

Tracker Submit via Email

Perform this task:

Daily

Weekly

Monthly

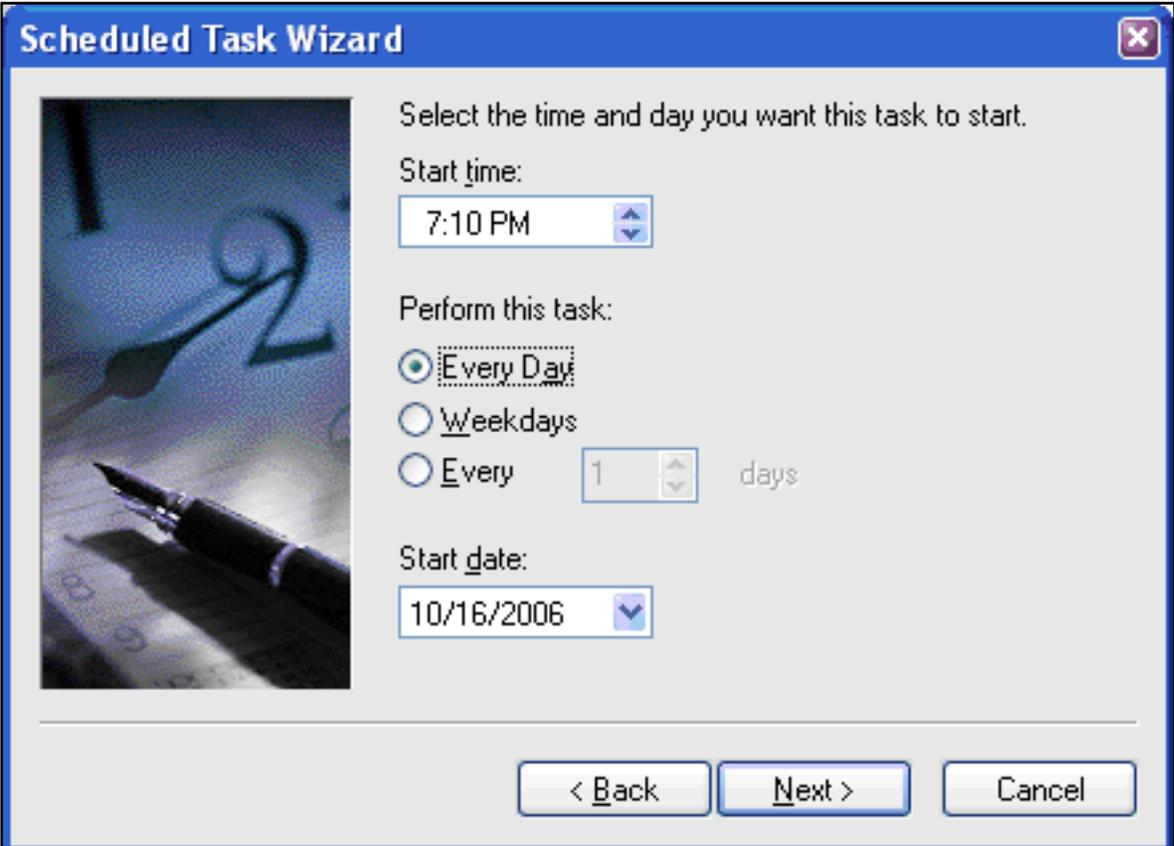
One time only

When my computer starts

When I log on

< Back   Next >   Cancel

7. The current time will be displayed as "Start Time". For the "Perform this task:" option, select "Every Day". The current date will be displayed as "Start Date". Click Next to continue.



**Scheduled Task Wizard**

Select the time and day you want this task to start.

Start time:

7:10 PM

Perform this task:

Every Day

Weekdays

Every 1 days

Start date:

10/16/2006

< Back   Next >   Cancel

8. Enter the User ID of an Administrator user (it is recommended that you use the local Administrator user). Enter and confirm the password of this user. Click Next.
9. The values you entered will be displayed. Check the box next to the option "Open advanced properties for this task when I click Finish", then click on the Finish button.



10. The Advanced properties will be displayed. Click on the Task tab. In the "Run" field, enter the following:

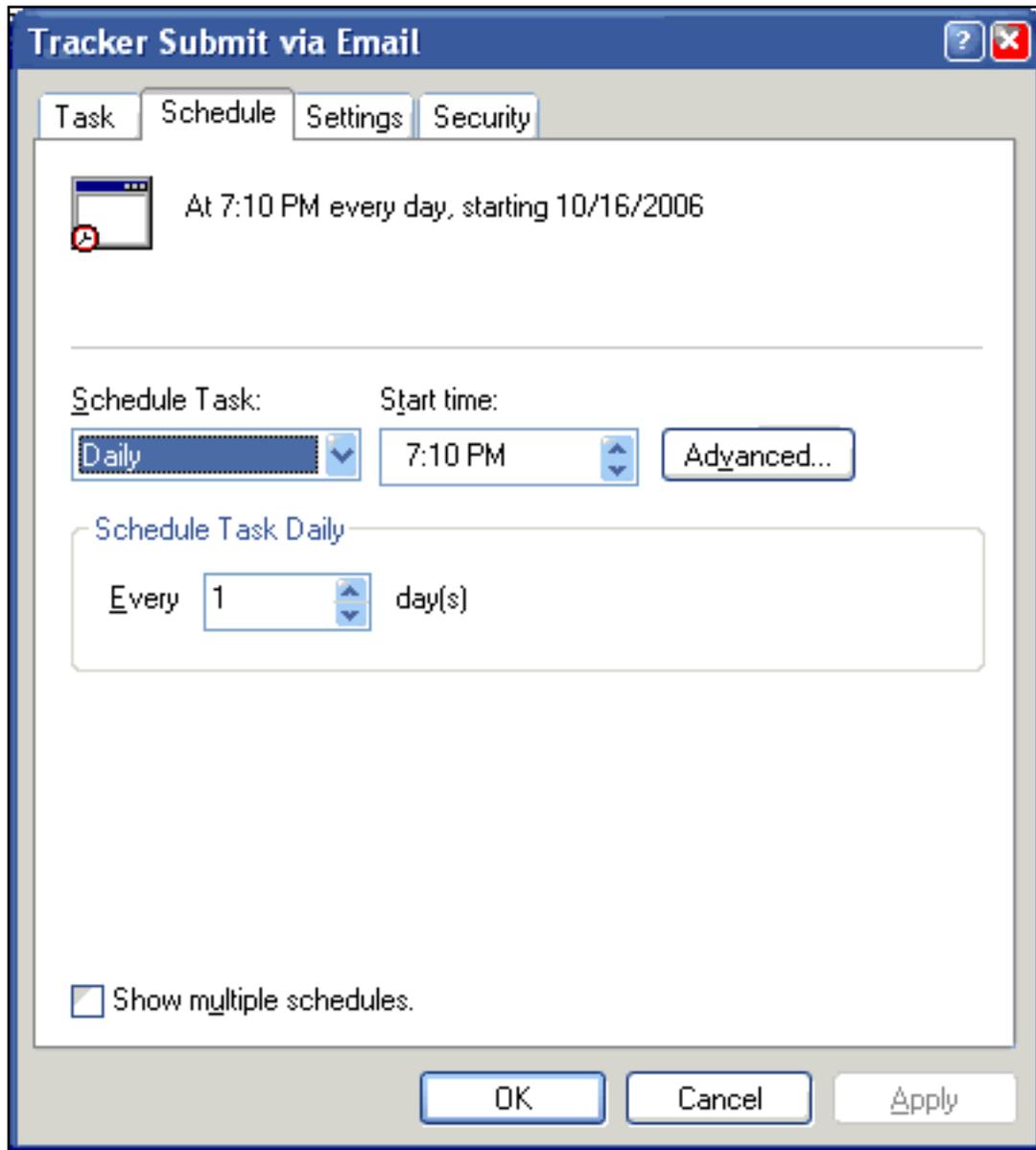
**CScript.exe "<PTEmails.jse file path>" //B //H:CScript**

where <PTEmails.jse file path> is the path where the PTEmails.jse file resides. As mentioned above, by default, this path is **C:\Program Files\NetResults\Tracker**. Using the default path as an example, the Run field should have the following entered:

**CScript.exe "C:\Program Files\NetResults\Tracker\PTEmails.jse" //B //H:CScript**

Please note that the PTEmails.jse file path should be enclosed with double quotes.

11. Click on the Schedule tab, then click on the Advanced button.



12. Check the box next to "Repeat task", then for "Every" select a length of time. We recommend using a minimum of "10 minutes". This time dictates how frequently you wish to run the Email Processor to check for new emails. You can specify any repeat time you wish, but make sure that it is more than 10 minutes. For "Until" select the radio button next to "Duration". Enter "24 hours" for the "Duration". Click OK.

**Advanced Schedule Options**

Start Date: Monday, October 16, 2006

End Date:

Repeat task

Every: 10 minutes

Until:  Time:

Duration: 24 hour(s)  minute(s)

If the task is still running, stop it at this time.

OK Cancel

- Click on the Settings tab. Check the box for the option "Stop the task if it runs for:", then enter "0" for hours and "30" for minutes. Click Apply, then click OK to save these changes and dismiss the Properties for the Scheduled Task.

---

## Submitting a Record via Email

After enabling this feature using the steps [above](#), to add a record via email, send an email to the mail account specified in the [Incoming Email Settings](#) that corresponds to the project for which you want to add a new record.

---

## Email Notification for Unregistered Users

Email notification messages can be sent to unregistered users reporting issues using the Submit via Email feature. Designate a Text type field to be the collect the reporter's email address when records are submitted via email using the [Unregistered User Email](#) attribute in the [Managing Fields](#) section.

You can set preferences for the Date and Time information, email content and actions that send an email notification to unregistered users by configuring the [Unregistered User Options](#) in the [General Preferences](#) section.

---

## Required Fields on Add Page

The Submit via Email feature bypasses the "Required For Add" attribute for all field types. This is especially useful with respect to the Product field as it allows you add records via email for the default option menu item in the Product field while still requiring that a non-default value be selected on the Add page within Tracker.

---

## Record Visibility for Records Submitted via Email

When [Record Visibility](#) is enabled in a workgroup, the visibility of each record added via email will be set based on the whether the email message is mapped or unmapped. The only exception is that all records are made visible to the Admins user group regardless of whether the email was mapped or unmapped.

When the option **Set Reporter by Mapping "From" Address** in the [Incoming Email Settings](#) is set to "Yes", this indicates that Tracker should attempt to match the From email address of the incoming message to the email address listed in the profile information for any user account. If the From email address in the incoming message matches an email address for a user in the workgroup, this user will be set as the Reporter of the record created by the incoming message. This is a **Mapped** email.

The new record resulting from a mapped email will be set such that it is visible to the user groups in which the Reporter is a member as well as the Admins user group.

When the option **Set Reporter by Mapping "From" Address** in the [Incoming Mail Configuration](#) is set to "No", Tracker will not attempt to map the From email address to a user in the workgroup. This is an **Unmapped** email. Or, if the Set Reporter by Mapping 'From' Address is set to "Yes" and a match is not found, this is also an **Unmapped** email.

The new record resulting from an unmapped email will be set such that it is visible to the user groups selected for the option **Visibility for Records Submitted by Unregistered Users via Email** in the [Record Visibility](#) section as well as the Admins user group.

---

## Error Handling

Incoming messages with invalid formats (e.g. characters from an unsupported character set, incorrect multipart content, etc.) will be processed such that the field where the body of the incoming message is stored will note "Invalid Email Format. See Attachments." A copy of the raw email will be saved as an attachment called "rawemail.txt" in the record created for this incoming message. The raw email will be saved as an attachment irrespective of how the [Save Raw Email as Attachment](#) option is set.

If there are any control characters that are not supported by XML present, these will be converted into "blank" characters.



## Overview

The Knowledge Base is a feature that facilitates the process of creating and publishing articles to allow end users (customers, vendors, partners, any users) to search these articles for answers to questions and issues. Providing an information source that end users can use self-sufficiently reduces the effort needed to support end users. The Knowledge Base also provides a means of documenting and proliferating information to minimize the time needed to resolve an issue.

## Enabling the Knowledge Base

A Knowledge Base license key is required to use this feature. Enter your license key in the corresponding tab of the [Tracker License Manager](#).

Once your license key has been entered, create a new workgroup with "Knowledge Base" selected as the template type in the Workgroup Management System (WMS). An explanation of how this template is set up can be found in the section [Using the Knowledge Base template](#). To create a new workgroup in WMS, refer to the [Adding a Workgroup](#) section of the [WMS Help Guide](#).

To enable the Knowledge Base in the new workgroup, go to the General Preferences section by performing the following steps:

1. Login to the Knowledge Base workgroup as Admin
2. Click on the Admin icon
3. Click on the General Preferences button
4. Scroll to the Knowledge Base section, set the preference called Enable Knowledge Base to "Yes"
5. Click OK to save this change

## Knowledge Base Components

There are several components of the Knowledge Base that can be customized:

- [Workflow](#)

You can configure a set of workflow steps for the process of creating, reviewing, and publishing Knowledge base articles. A new Knowledge Base workgroup has a default workflow configured which is explained in detail in the Knowledge Base template section of this Help Guide.

- [Search Page](#)

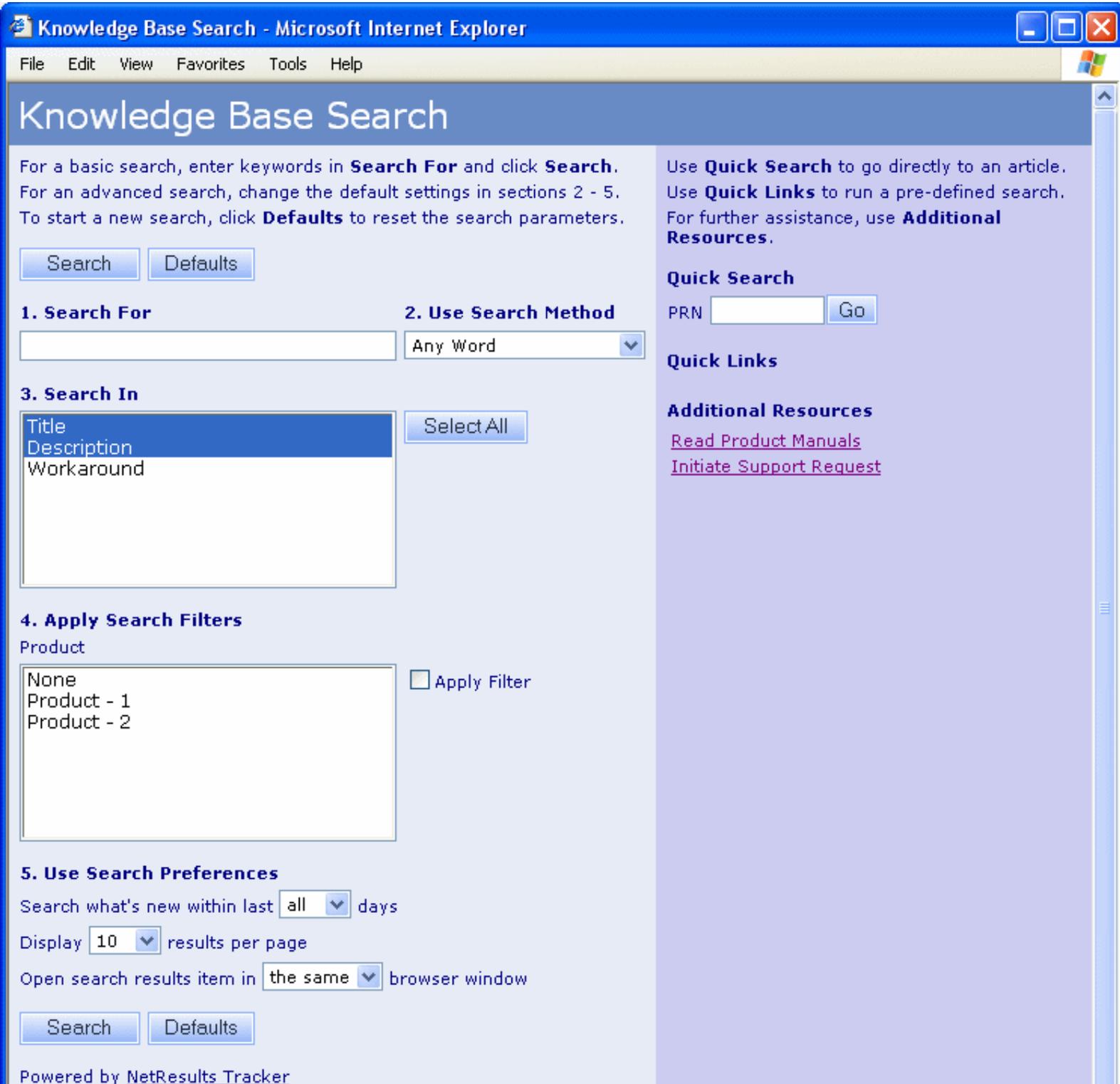
Customize the page where users will perform searches. You will be able to select the content displayed and options provided such as search methods (all words, any word, exact phrase) and preferences.

- [Results Page](#)  
Define the fields that will be displayed as part of the search results.
- [Item Page](#)  
Design how each individual Knowledge Base article will be displayed e.g. which field will be used as the article's title, which other fields will be included in the article.
- [Preferences](#)  
Set preferences such as date and time formats that are applied to the Knowledge Base for all searches.
- **Customize the KB Pages with your own HTML**  
The Search, Results, and Item pages include the ability to add your own HTML to change the look and feel of the pages presented to your users. Refer to the sections for each component above for details on customizing the HTML for each of the Knowledge Base pages.

The Search Page is the first page users will see when they attempt to use the Knowledge Base. The URL for this page is:

**<http://servername/workgroup/kb/search.asp>**

where **servername** is the TCP / IP name of the machine where Tracker is installed and **workgroup** is the name of the Tracker workgroup you created as the Knowledge Base. An example of a Search Page is shown in the image below. The Search Page is configured with default settings. A detailed explanation of the default settings can be found in the section [Using the Knowledge Base template](#).



**Knowledge Base Search** - Microsoft Internet Explorer

File Edit View Favorites Tools Help

## Knowledge Base Search

For a basic search, enter keywords in **Search For** and click **Search**.  
For an advanced search, change the default settings in sections 2 - 5.  
To start a new search, click **Defaults** to reset the search parameters.

**1. Search For**

**2. Use Search Method**

**3. Search In**

Title
Description
Workaround

**4. Apply Search Filters**

Product

None
Product - 1
Product - 2

Apply Filter

**5. Use Search Preferences**

Search what's new within last  days

Display  results per page

Open search results item in  browser window

Powered by [NetResults Tracker](#)

Use **Quick Search** to go directly to an article.  
Use **Quick Links** to run a pre-defined search.  
For further assistance, use **Additional Resources**.

**Quick Search**

PRN

**Quick Links**

**Additional Resources**

[Read Product Manuals](#)  
[Initiate Support Request](#)

---

## Customizing the Search Page

To customize the Search Page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Knowledge Base** button
4. Click on one of the buttons to the left of the Search Page. Details about these options can be found below.

---

## Header and Footer

### Header or Footer

Click on the **Header** or **Footer** button to the left of Search Page on the Knowledge Base Configurations Page to customize the Header or Footer section of the Search Page. You can enter your own custom HTML into the text box provided. Click OK to save your changes. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.

### Page Title

Enter up to 80 characters to be displayed as the page title in the browser. The text you enter will be displayed before the browser name (as shown by the text "Knowledge Base Search" before "Microsoft Internet Explorer" in the [sample](#) above). You can use the variable <workgroup> to include the name of the workgroup as part of the Page Title.

---

## Contents

Several items can be customized in the Contents of the Search Page. The Contents section contains the tools end users will employ to search through the Knowledge Base. The settings you choose in this page will determine how users will be able to conduct searches to return the desired information.

To customize the options on the Contents page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Knowledge Base** button
4. Click on the **Contents** button to the left of "Search Page"

For all components that can be customized as Contents of the Search Page, a **Visible** column displays whether this component is visible to users on the Search page. A checkmark in the Visible column indicates that the component is visible. By default, all components are visible. To remove the component from being displayed on the Search page, click on the **Edit** button and uncheck the box for the **Is Visible** option, then click OK to save your change. When a component is invisible (check mark not present in the Visible column for that component), the default selection for this component will be used during all searches. The default settings are described in the component details below. The components **Search Words**, **Right Pane**, and **Left Pane** cannot be made invisible.

---

## Search Words

Search Words is the component where users enter the key word(s) to be used as search criteria. Click on the **Edit** button to the left of "Search Words" to customize the label. By default, this is set to "1.Search For". Click **OK** to save your changes.

---

## Search Methods

This component displays the allowed methods of searching the Knowledge Base information. Examples of Search Methods are "All Words", "Any Word", "Exact Phrase", and "Boolean Expression".

Click on the **Edit** button to modify the label of this field. By default, it is set to "2. Use Search Method". Click **OK** to save the change.

When the **Is Visible** box is checked, this component is displayed on the Search Page. If you choose to make this component invisible by unchecking the box, the value selected in the **Set Default** section will be used for all searches.

Click on the **Select Methods** button to choose which Search Methods will be provided for use while searching the Knowledge Base. Click on a method to highlight it and click OK to save. At least one method must be selected. Multiple search methods can be selected by holding the "CTRL" button on your keyboard while clicking on multiple search methods.

- **All Words:** The search will return all Knowledge Base articles which contain all of the words typed into the "Search Words" field.
- **Any Word:** The search will return all articles which contain any of the words typed into the "Search Words" field.
- **Exact Phrase:** The search will return all articles which contain the exact match for the string typed into the "Search Words" field.
- **Boolean Expression:** You can allow the use of Boolean operators such as "AND" and "OR". A + sign can be used as "AND". You can also use quotes to distinguish a string of words as one part of the Boolean expression.

### Search Method Examples

Key Word(s) or Phrase entered in Search For field	Search Method	Results
access denied	Any Word	The search will return all records which contain the word "access" <b>OR</b> the word "denied".
access denied	All Words	The search will return all records which contain <b>both</b> "access" <b>AND</b> "denied".
access denied	Exact Phrase	The search will return all records which contain the <b>string</b> "access denied".
access OR denied	Boolean Expression	The search will return all records which contain the word "access" <b>OR</b> the word "denied".
access AND denied	Boolean Expression	The search will return all records which contain the word "access" <b>AND</b> the word "denied".

Click on the **Set Default** button to choose which Search Method will be used as the default. If the Search Methods component is visible on the Search Page, the default will be selected as the search method for all searches unless changed by the user performing a search. If it is not visible on the Search Page, the default will be used as the Search Method for all searches. Click **OK** to save your default selection.

### Search Fields

Any of the text fields (fields of the format Text or TextArea) created in the [Manage Fields](#) section can be selected as part of the Knowledge Base search. The settings for this component determine which text fields within the Knowledge Base articles will be searched to find a match for the key word(s) entered in the Search Words field.

Click on the **Edit** button to modify the label for this component. By default, it is set to "3. Search In".

When the **Is Visible** box is checked, this component is displayed on the Search Page. If you choose to make this component invisible by unchecking the box, the value selected in the **Set Defaults** section will be used for all searches.

Click on the **Select Fields** button to choose which fields are available as Search Fields on the Search Page. At least one value must be selected for this field. Multiple values can be selected for this field by holding down the "CTRL" button on your keyboard as you click on multiple fields. Click **OK** to save your selections.

Click on the **Set Defaults** button to select which fields are selected by default. If the Search Fields component is visible on the Search Page, the default(s) will be selected for all searches unless changed by the user performing the search. If it is not visible on the Search Page, the default(s) will be used for all searches. Multiple values can be selected for this field by holding down the "CTRL" button on your keyboard as you click on multiple fields. Click **OK** to save your default selections.

---

## Search Filters

Any of the pulldown fields created in the [Manage Fields](#) section can be selected to narrow down the search. The settings for this component determine which pulldown fields and their corresponding option menu items can be selected as filters. Selecting an item(s) as a filter on the Search Page will cause the search to return all articles that match the Search Words criteria AND match the filter(s) selected.

**Example:** Product is configured as a Search Filter. The Product field contains an option menu item called "Our Browser". When "Our Browser" is selected as a filter when performing a search of the Knowledge Base, the search results will be all articles that matched the key word(s) entered into the Search Words field AND have "Our Browser" selected for the Product field.

Click on the **Edit** button to modify the label for this field. By default, this is set to "4. Apply Search Filters".

When the **Is Visible** box is checked, this component is displayed on the Search Page. If you choose to make this component invisible by unchecking the box, the value selected in the **Set Defaults** section will be used for all searches.

Check the box for **Allow Multiple Selection for Filters** if you wish to allow users to select more than one option menu item in each filter to be used in the search. When multiple option menu items are selected as filters, the search will return all articles which match the criteria listed in the Search For field AND which match one of the option menu items selected as filters.

**Example:** Product is configured as a Search Filter. The Product field contains option menu items called "Our Browser" and "Our Database". When "Our Browser" and "Our Database" are selected as filters when performing a search of the Knowledge Base, the search results will return all articles that matched the key word(s) entered into the Search Words field AND have either "Our Browser" OR "Our Database" selected for the Product field.

Check the box for **Include 'Apply Filter' option** if you wish to allow users to choose which filters should be applied. Unchecking this box indicates that a user will have to select an option menu item for each filter displayed, which will be used as part of the search criteria.

In the **Apply Filter Label** field, enter the name to be used for the check box option on the Search Page which determines whether the filter will be used in the search. By default, this label is "Apply Filter".

Select an option for **Initial Apply Filter Settings**.

- When choosing the option **Apply All Filters (all checked)** with **Include 'Apply Filter' option** enabled, the Search Page will have the "Apply Filter" box checked for all filters displayed.
- When choosing the option **Don't Apply Any Filter (all unchecked)** with **Include 'Apply Filter' option** enabled, the Search Page will have the "Apply Filter" box unchecked for all filters displayed.
- When choosing the option **Apply If Search Filter Has Default(s)** with **Include 'Apply Filter' option**, the Search Page will have the "Apply Filter" box checked for any filter which has a default(s) selected in the **Set Defaults** section for Search Filters.

For the **Include Obsolete Items** option, check the box if you wish to allow option menu items that have been marked as obsolete to be available as search filters. Option menu items that have been marked as obsolete are values that have been deactivated in the pulldown field's [Items](#) section.

Click **OK** to save your selections for the **Search Filters** component.

Click on the **Select Filters** button to select the pulldown fields that will be displayed as possible filters on the Search page. Multiple values can be selected by holding down the "CTRL" button on your keyboard as you click on multiple fields. Selecting a pulldown field indicates that all option menu items with the "Value Is Public" option enabled for this pulldown will be displayed as possible filters on the search page. Click **OK** to save your selections.

Click on the **Set Defaults** button to select the option menu item(s) that will be selected by default as Search Filters. If the Search Filters are

set to be visible on the Search Page, the default(s) will be selected as filters for all searches unless changed by the user performing the search. If the Search Filters are not visible on the Search Page, the default(s) (if any) will be used for all searches. Multiple values can be selected for each filter by holding down the "CTRL" button on your keyboard as you click on multiple fields. Click **OK** to save your selections.

---

## Search Preferences

This option allows you to define the following preferences for the search results:

- Searching records added to the Knowledge Base within a given number of days with respect to a date field, such as, limiting the search to return articles where the Publication Date field is within the last X number of days.
- Limiting the number of results to be displayed on the Results page
- Whether the results page should be displayed in the same browser window or launch a new one

Click on the **Edit** to modify the label for this field. By default, it is set to "5. Use Search Preferences".

When the **Is Visible** box is checked, this component is displayed on the Search Page. If you choose to make this component invisible by unchecking the box, the values selected in the **Set Preferences** section will be used for all searches. Click **OK** to save your changes.

Click on the **Set Preferences** button to configure the Search Preferences. You can choose to display each preference by checking the box in the **Visible** column

The preference **Search what's new within the last given number of days from a Date Field** narrows the search results to be articles that were modified within the last X number of days from the Date Field selected. You can select a default setting for the number of days by making a choice for this field in the Preference column. The available choices for number of days are all, 2, 7, 14, 30, 60, 90, 180. You can also set which date field is referenced to determine the article's age for all searches. All of the Date type fields in use in the Knowledge Base workgroup will be displayed as choices for this setting. If this preference is visible on the Search Page, the users can specify the number of days to limit the search results. If this preference is invisible, the default number of days set as the default will be used for all searches.

The preference **Display a given number of results per page** sets the number of articles that will be displayed per page in a list as the result of a search. A default can be set by making a choice in the Preference column for this field. The choices for this setting are 10, 20, 30, 50, 100. If the field is visible on the Search page, users will be able to make their own selection from the above choices. If the field is invisible, the default choice will be used for all searches.

The preference **Open search results item in same or new window** allows you to choose whether the list of results are displayed in the same browser window as the Search Page or are opened in a new browser window. If this field is visible on the Search Page, the users can make their own selection. If it is invisible, the value set in the Preference column will be used for all searches.

After making your selections, click **OK** to save the preferences.

---

## Quick Search

Quick Search is a feature that allows end users to type in the number of the Knowledge base article he or she wishes to see to immediately view that article.

Click on the **Edit** to modify the label for this field. By default, it is set to "Quick Search".

When the **Is Visible** box is checked, the Quick Search section will be displayed on the Search Page. Click **OK** to save your changes.

---

## Quick Links

Quick Links is a feature that allows you to save Knowledge Base searches with particular criteria as links on the Search Page. Your end users can click on these links to immediately run one of the saved search reports.

Click on the **Edit** to modify the label for this field. By default, it is set to "Quick Links".

When the **Is Visible** box is checked, the Quick Links section will be displayed on the Search Page. Click **OK** to save your changes.

Click on the **Modify Links** button to add and edit the Quick Links displayed on the Search page. A new browser window will be launched with the Knowledge Base Search Page displayed.

#### To add a Quick Link:

1. Enter a name for the Quick Link in the **Quick Link Label** field. This name will be displayed in the Quick Links section of the Search Page.
2. Enter the order for the Quick Link to be displayed relative to other Quick Links in the **Quick Link Order** field.
3. Make selections in the search criteria fields to be saved as the search criteria for the saved Knowledge Base search: Search For, Search Methods, Search In, Filters, and Preferences
4. Click on the **Add** button to save this search as a Quick Link.
5. The Quick Link will be displayed in the right column in the Quick Links section



**To edit a Quick Link**, click on the Edit icon to the right of the Quick Link in the right pane.



**To delete a Quick Link**, click on the Delete icon to the right of the Quick Link in the right pane.

## Right and Left Panes

The right and left panes on the Search Page can be customized to add your own custom HTML to the Header and Footer. These sections can be used to provide instructions about how to use the Search Page, links to additional resources for your end users, etc.

Click on the **Header** or **Footer** button to the left of **Right Pane** or **Left Pane** to customize the Header or Footer section of either pane. You can enter your own custom HTML into the text box provided. Click OK to save your changes. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>.

By default, HTML has been entered to provide the following information in the panes:

- The **Right Pane Header** provides instructions for using the **Quick Search** and **Quick Links** sections that appear in the pane
- The **Right Pane Footer** is set to provide an **Additional Resources** section with other links that could assist end users, such as links to **Read Product Manuals** and **Initiate Support Requests**
- **Left Pane Header** provides instructions for performing a Knowledge Base search

## Customizing the Color Preferences for the Search Page

You can customize the color scheme displayed on the Search Page.

To customize the color preferences on the Search Page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon in the Button Bar
3. Click on the **Knowledge Base** button
4. Click on the **Color** button to the left of Search Page
5. Make selections for the color preferences (see [preferences](#) for a detailed description of each item)
6. Click **OK** to save the changes

## Color Preferences

The following color preferences can be set for the Search Page.

## General Settings

### Page Background

The background color for the body of the Search Page. The Page Background is not usually visible on the Search Page; it depends on how many fields and options are available on the Search Page.

### Header Background

The background color of the section at the top of the Search Page (e.g. the color behind the text "Knowledge Base Search" in the [Search Page Sample](#)).

### Header Text

The color of the text displayed in the top section of the Search Page (e.g. the color of the text "Knowledge Base Search" in the [Search Page Sample](#)).

### Footer Background

The background color of the section at the bottom of the Search Page (e.g. the color behind the text "Support | Sales" in the [Search Page Sample](#)).

### Footer Text

The color of the text in the bottom section of the Search Page (e.g. the color of the text "Support | Sales" in the [Search Page Sample](#)).

## Left Pane Settings

### Background

The background color in the left pane of the Search Page (e.g. the color behind the text "1. Search For" in the [Search Page Sample](#)).

### Header Background

The background color of the top section of the left pane (e.g. the color behind the text "Enter keywords in Search" in the [Search Page Sample](#)).

### Footer Background

The background color of the bottom section of the left pane (e.g. the color behind the text "NetResults Tracker search" at the bottom of the left pane in the [Search Page Sample](#)).

### Title Text

The color of the text displayed above the Search options in the left pane (e.g. the color of the text "1. Search For" in the [Search Page Sample](#)).

### SubTitle Text

The color of the text displayed for any sub titles in the Left Pane (e.g. the color of the text "Product" in the [Search Page Sample](#)).

### Body Text

The color of the text displayed within the body of the left pane (e.g. the color of the text "Enter keywords in Search", "Search what's new" and "NetResults Tracker Search" in the [Search Page Sample](#)).

### Warning Text

The color of the text that is displayed when there is a warning about an item on the Search Page (e.g. when a field is selected as a Search Filter, but does not have any option menu items that are public to be used as filters).

## Right Pane Settings

### Background

The background color in the right pane of the Search Page (e.g. the color behind the text "Quick Search" in the [Search Page Sample](#)).

### Header Background

The background color of the top section of the right pane (e.g. the color behind the text "Use Quick Search" in the [Search Page Sample](#)).

### Footer Background

The background color of the bottom section of the right pane (e.g. the color behind the text "NetResults Tracker search" at the bottom of the right pane in the [Search Page Sample](#)).

### Title Text

The color of the text displayed above the Search options in the right pane (e.g. the color of the text "Quick Search" in the [Search Page Sample](#)).

### Body Text

The color of the text displayed within the body of the right pane (e.g. the color of the text "Use Quick Search" and "NetResults Tracker Search" in the [Search Page Sample](#)).

---

## Customizing the Style Sheet for the Search Page

A style sheet is used to determine the size, style and family of the fonts on the Search Page. You can use your own style sheet by placing a copy of your style sheet into the Styles directory of your workgroup's Knowledge Base files. Any color options set in the style sheet will be overridden by the settings in the [Color Preferences](#) section for the Search Page. The directory can be found at:

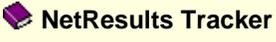
**<installation directory>/workgroup/KB/Styles**

where <installation directory> is the location where you installed your Tracker files. By default, the <installation directory> is at C:\inetpub\wwwroot\NetResultsTracker and *workgroup* is the name of the workgroup used as Knowledge Base.

Click on the **Style** button to the left of the Search Page to specify the name of your customized style sheet. In the **Style Sheet File Name** field, enter the name of your style sheet file in the format **FileName.Extension** as in the example **KBStyle6.css**, which is the style sheet used by default.

Check the box for the option **Apply to all pages** to apply the style sheet entered in the **Style Sheet File Name** field to all pages related to the Knowledge Base. Enabling this option will overwrite any other style sheets specified in the **Style** section for the Results and Item pages.

Click **OK** to save your selections.



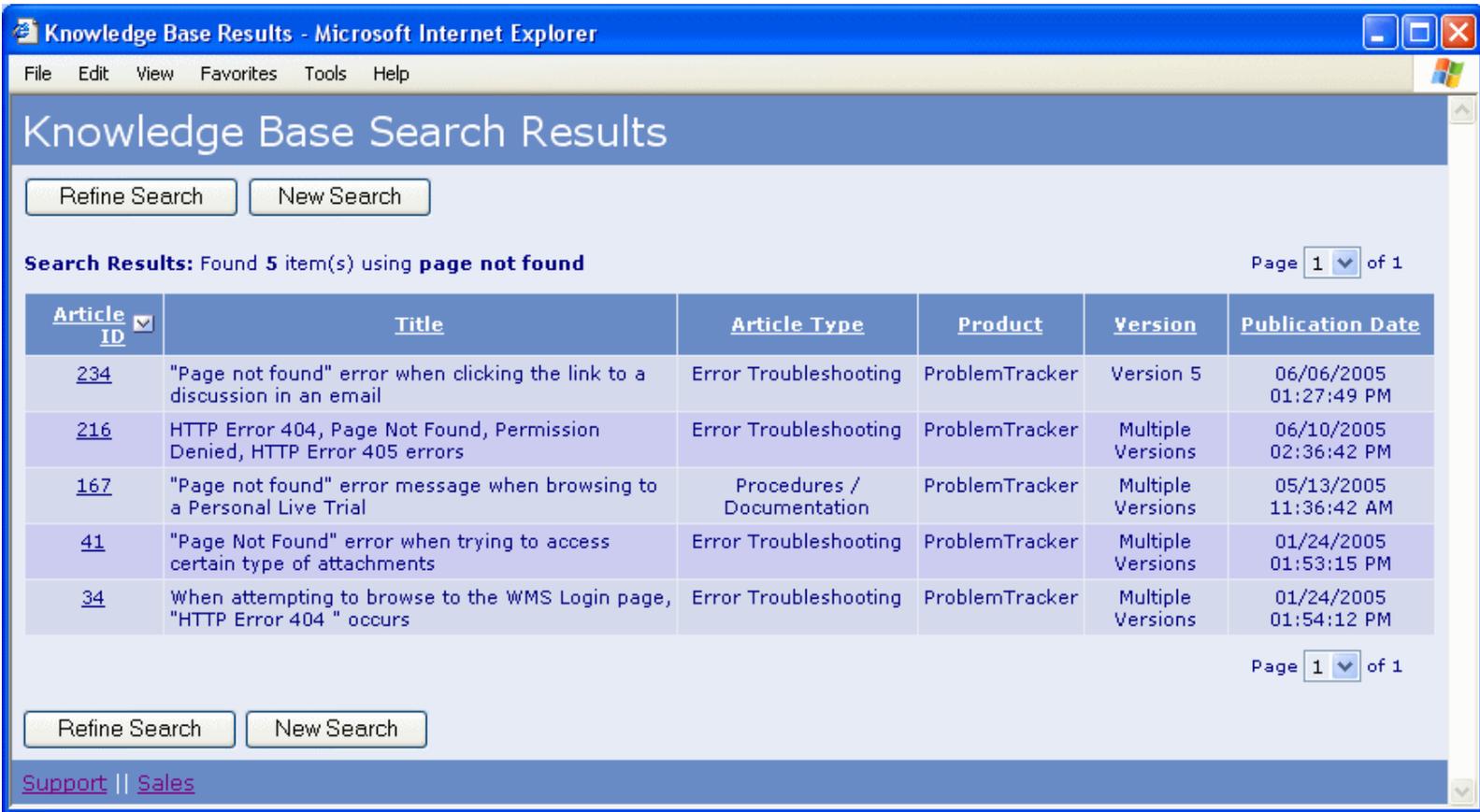


---

Results Page

Help Topics
<<
>>

The Results Page is the page that will display the list of articles that matched the criteria specified on the Search page. Various aspects of the Results Page can be customized as described below. A set of results is displayed as an example below.



**Knowledge Base Results - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

## Knowledge Base Search Results

**Search Results:** Found 5 item(s) using **page not found** Page 1 of 1

Article ID	Title	Article Type	Product	Version	Publication Date
<a href="#">234</a>	"Page not found" error when clicking the link to a discussion in an email	Error Troubleshooting	ProblemTracker	Version 5	06/06/2005 01:27:49 PM
<a href="#">216</a>	HTTP Error 404, Page Not Found, Permission Denied, HTTP Error 405 errors	Error Troubleshooting	ProblemTracker	Multiple Versions	06/10/2005 02:36:42 PM
<a href="#">167</a>	"Page not found" error message when browsing to a Personal Live Trial	Procedures / Documentation	ProblemTracker	Multiple Versions	05/13/2005 11:36:42 AM
<a href="#">41</a>	"Page Not Found" error when trying to access certain type of attachments	Error Troubleshooting	ProblemTracker	Multiple Versions	01/24/2005 01:53:15 PM
<a href="#">34</a>	When attempting to browse to the WMS Login page, "HTTP Error 404 " occurs	Error Troubleshooting	ProblemTracker	Multiple Versions	01/24/2005 01:54:12 PM

Page 1 of 1

[Support](#) || [Sales](#)

## Header and Footer

### Header or Footer

Click on the **Header** or **Footer** button to the left of Results Page on the Knowledge Base Configurations Page to customize the Header or Footer section of the Results Page. You can enter your own custom HTML into the text box provided. Click OK to save your changes. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>. The Header is the part where "Knowledge Base Search Results" is displayed in the in the [sample](#) above. The Footer is the part where "Support || Sales" is displayed in the [sample](#) above.

### Page Title

Enter up to 80 characters to be displayed as the page title in the browser. The text you enter will be displayed before the browser name (as shown by the text "Knowledge Base Results" before "Microsoft Internet Explorer" in the [sample](#) above). You can use the variable <workgroup> to include the name of the workgroup as part of the Page Title.

## Contents

Click on the **Contents** button to the left of the Results Page on the Knowledge Base Configurations Page to customize the contents of the Results page. Specifically, you can select which fields will be used as the columns on the list where articles are displayed on the Results Page. All fields created in the [Manage Fields](#) section of the workgroup are available to be selected as columns for the Results Page. Fields listed in the **Selected Items** column are the fields that will appear on the Results Page.

To **add** a field to the **Selected Items** column:

1. Click on the name of a field in the **Not Selected Items** column
2. Click on the **Add** button
3. If desired, change the order in which the field appears relative to the other fields in the Selected Items column by clicking on the **Edit** button, then entering the number to be used as the new order. Click **OK** to save the new value for the order.

To **remove** a field from the **Selected Items** column:

1. Click on the name of a field in the **Selected Items** column
2. Click on the **Remove** button

The Record Number field (called PRN by default) is required to be displayed on the Results page so that each article has a unique identifier. Thus, the Record Number field cannot be removed from the **Selected Items** column.

When a TextArea field is selected to be displayed on the Results page, the contents of the field will be truncated to 255 characters in the results of a Knowledge Base search.

## Customizing the Color Preferences for the Results Page

The color scheme of the Results Page can be customized.

To set the color preferences for the Results Page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon in the Button Bar
3. Click on the **Knowledge Base** button
4. Click on the **Color** button to the left of Results Page
5. Make selections for the color preferences (a detailed description of each item is available in [preferences](#))
6. Click **OK** to save the changes

## Color Preferences

The following color preferences can be set for the Results Page.

Knowledge Base Search Results		
<b>Search Results:</b>		Found 15 item(s)
		Page 1 of 3
PRN	Request Type	Product
1	Enhancement Request	Prod-1
2	Bug	Prod-2
3	New Request	Prod-2
4	Bug	Prod-4
5	Feature Requested	Prod-3

Page 1 of 3

Support | Sales

## General Settings

### Page Background

The background color for the Results Page. The page background may not be visible on the Results Page at all times; it depends on the number of results that matched the search.

### Header Background

The background color of the top section of the Results Page (e.g. the color behind the text "Knowledge Base Search Results" in the [Results Page Sample](#).)

### Header Text

The color of the text displayed in the top section of the Results Page (e.g. the color of the text "Knowledge Base Search Results" in the [Results Page Sample](#).)

### Footer Background

The background color of the bottom section of the Results Page (e.g. the color behind the text "Support | Sales" in the [Results Page Sample](#).)

### Footer Text

The color of the text displayed in the bottom section of the Results Page (e.g. the color of the text "Support | Sales" in the [Results Page Sample](#).)

### Body Background

The background color of the body of the Results Page (e.g. the color behind the text "Search Results" in the [Results Page Sample](#).)

### Body Title

The color of the title text in the body of the Results Page (e.g. the color of the text "Search Results" in the [Results Page Sample](#).)

### Body Text

The color of the non-title text in the body of the Results Page (e.g. the color of the text "Found 15 item(s)" in the [Results Page Sample](#).)

### Paging Text

The color of the text for paging through the results (e.g. the color of the text "Page" and "of 3" in the [Results Page Sample](#).)

### Paging Pulldown Background

The background color of the paging pulldown (e.g. the color behind the "1" in the paging pulldown in the [Results Page Sample](#).)

### Error Message Text

The color of the text that is displayed if no matches are found for the criteria entered on the Search Page (e.g. if no matches are found, the text "Sorry, no match found for your search. Please click here to modify your search." will be displayed in the color selected for this option).

## Table Settings

### Table Header Background

The color of the top row in the table displaying the results (e.g. the color behind the text "PRN", "Request Type" and "Product" in the [Results Page Sample](#).)

### Title Text

The color of the text in the top row of the table displaying the results (e.g. the color of the text "PRN", "Request Type" and "Product" in the [Results Page Sample](#).)

### Odd Row Background

The background color of the odd-numbered rows of the table displaying the results (e.g. the color behind the text "1", "Enhancement Request" and "Prod-1" in the [Results Page Sample](#).)

### Odd Row Text

The color of the text in the odd-numbered rows of the table displaying the results (e.g. the color of the text "1", "Enhancement Request" and "Prod-1" in the [Results Page Sample](#).)

### Even Row Background

The background color of the even-numbered rows of the table displaying the results (e.g. the color behind the text "2", "Bug" and "Prod-2" in the [Results Page Sample](#).)

### Even Row Text

The color of the text in the even-numbered rows of the table displaying the results (e.g. the color of the text "2", "Bug" and "Prod-2" in the [Results Page Sample](#).)

---

## Customizing the Style Sheet for the Results Page

A style sheet is used to determine the size, style and family of the fonts on the Results Page. You can use your own style sheet by placing a copy of your style sheet into the Styles directory of your workgroup's Knowledge Base files. Any color options set in the style sheet will be overridden by the settings in the [Color Preferences](#) section for the Results Page. The directory can be found at:

**<installation directory>/workgroup/KB/Styles**

where <installation directory> is the location where you installed your Tracker files. By default, the <installation directory> is at C:\inetpub\wwwroot\NetResultsTracker and *workgroup* is the name of the workgroup used as Knowledge Base.

Click on the **Style** button to the left of the Results Page to specify the name of your customized style sheet. In the **Style Sheet File Name** field, enter the name of your style sheet file in the format **FileName.Extension** as in the example **KBStyle6.css**, which is the style sheet used by default.

Check the box for the option **Apply to all pages** to apply the style sheet entered in the **Style Sheet File Name** field to all pages related to the Knowledge Base. Enabling this option will overwrite any other style sheets specified in the **Style** section for the Search and Item pages.

Click **OK** to save your selections.

The Item Page is the page that will display the information within a Knowledge Base article. Various aspects of the item Page can be customized as described below.

**Knowledge Base Article**

Results    New Search

## "Page not found" error when clicking the link to a discussion in an email

Article ID	234
Article Type	Error Troubleshooting
Product	ProblemTracker
Oldest Version	5.0
Newest Version	5.0
Publication Date	06/06/2005 01:27:49 PM

**Warnings**  
None

**Description**  
This article provides information to fix the "Page not found" error that happens when clicking the link to discussion in an email message when using Version 5.0.

This error may be occurring because of one or both of the following conditions:

- The web site where your workgroup is installed uses a non-standard port (a port number other than port 80)
- The web site where your workgroup is installed is different than the web site where the Workgroup Management is installed.

If you are using ProblemTracker Version 5.0, you will need to upgrade to a newer version of ProblemTracker to correct known issues with the link provided in the discussion email notification messages. You can download the latest version of ProblemTracker from the [Support Downloads page](#). If you wish to workaround the issue without upgrading, please use the steps noted in the Workaround field below.

**Workaround**  
To workaround this issue to get to the Discussion mentioned in the email message:

1. Use the URL listed in the email message to determine the workgroup, record number, and thread referenced.
  - a. The workgroup will be listed in parentheses in the Subject line of the email message. For example, an email with the subject "Record 2 (pteval) - You are Invited to a Discussion" indicates that the name of the workgroup is pteval.
  - b. The record number will be listed in the Subject line of the email message. For example, an email with the subject "Record 2 (pteval) - You are Invited to a Discussion" indicates that the record where the discussion is located is Record 2.
  - c. The name of the thread will be listed in the first line in the message body. For example, an email with the first line "A new message has been posted to the 'Specification Review' discussion thread for Record 2" indicates that "Specification Review" is the name of the thread being referenced by the email message.
2. Login to the workgroup referenced in the email message.
3. Click on the Discuss icon, then enter the record number referenced in the email message.
4. Click on the name of the thread referenced in the email message.

Results    New Search

[Support](#) || [Sales](#)

## Header and Footer

### Header or Footer

Click on the **Header** or **Footer** button to the left of Item Page on the Knowledge Base Configurations Page to customize the Header or Footer section of the Item Page. You can enter your own custom HTML into the text box provided. Click OK to save your changes. Please do not enter any header tags into this area. Some examples of header tags are <HTML>, </HTML>, <BODY>, </BODY>. The Header is the text "Knowledge Base Article" displayed in the [Item Page Sample](#) above. The Footer is the text "Support || Sales" displayed in the [Item Page Sample](#) above.

### Page Title

Enter up to 80 characters to be displayed as the page title in the browser. The text you enter will be displayed before the browser name. You can use the variables <workgroup> to include the name of the workgroup as part of the Page Title. and <itemlabel> <number> to include the item label (e.g. "Article" or "PRN" or other label for the PRN field) and record number. The Page Title is the text "Knowledge Base Article ID 234" displayed in the [Item Page Sample](#) above.

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## Contents

The contents of the Item Page can be customized to determine which fields will displayed in the sections of each article. To customize the contents of the Item Page, click on the **Contents** button to the left of the Item Page on the Knowledge Base Configurations Page.

To customize the options on the Contents page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon in the Button Bar
3. Click on the **Knowledge Base** button
4. Click on the **Contents button** to the left of "Results Page"

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## Article Title

Click on the **Edit** button to the left of **Title** to select a field that will be used as the title for each article. All fields that are a **Text** type field will be available to be selected as the Article Title. Information on adding a Text type field to the database can be found in the [Managing Fields](#) Help section. Click **OK** to save your selection.

---

## Summary

Click on the **Edit** button to the left of **Summary** to select the fields that will be displayed in the Summary section of the article. All fields created in the [Manage Fields](#) section of the workgroup **except** fields that are **TextArea** type fields will be available to be displayed in the Summary section. Fields listed in the **Selected Items** column are the fields that will appear in the Summary section.

To **add** a field to the **Selected Items** column:

1. Click on the name of a field in the **Not Selected Items** column
2. Click on the **Add** button
3. If desired, change the order in which the field appears relative to the other fields in the Selected Items column by clicking on the **Edit** button, then entering the number to be used as the new order. Click **OK** to save the new value for the order.

To **remove** a fields from the **Selected Items** column:

1. Click on the name of a field in the **Selected Items** column
2. Click on the **Remove** button

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## Body

Click on the **Edit** button to the left of **Body** to select which fields will be displayed in the Body section of each Knowledge Base article. All fields created in the [Manage Fields](#) section of the workgroup will be available to be selected for the Body section. Fields listed in the **Selected Items** column are the fields which will appear in the Body section.

To **add** a field to the **Selected Items** column:

1. Click on the name of a field in the **Not Selected Items** column
2. Click on the **Add** button
3. If desired, change the order in which the field appears relative to the other fields in the Selected Items column by clicking on the **Edit** button, then entering the number to be used as the new order. Click **OK** to save the new value for the order.

To **remove** a field from the **Selected Items** column:

1. Click on the name of a field in the **Selected Items** column
2. Click on the **Remove** button

You can choose to display fields that are TextArea type fields as Text or HTML. By default, the fields will be displayed as Text. To display the fields as HTML, check the box called **Display TextArea Fields as HTML**. Click **OK** to save this change.

## Customizing the Color Preferences for the Item Page

The color scheme of the Item Page can be customized.

To set the color preferences for the Item Page:

1. Login to the Knowledge Base [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Knowledge Base** button
4. Click on the **Color** button
5. Make selections for the color preferences (a detailed description of each item is available in [preferences](#))
6. Click **OK** to save the changes

## Color Preferences

The following color preferences can be set on the Item Page.



## General Settings

### Page Background

The background color of the Item Page. The page background may not always be visible on the Item Page; it depends on how content is displayed in the article's Item Page.

### Header Background

The background color of the top section of the Item Page (e.g. the color behind the text "Knowledge Base Article" in the [Item Page Sample](#)).

### Header Text

The color of the text in the top section of the Item Page (e.g. the color of the text "Knowledge Base Article" in the [Item Page Sample](#)).

### Footer Background

The background color of the bottom section of the Item Page (e.g. the color behind the text "Support | Sales" in the [Item Page Sample](#)).

### Footer Text

The color of the text in the bottom section of the Item Page (e.g. the color of the text "Support | Sales" in the [Item Page Sample](#)).

### Body Background

The background color of the body of the Item Page (e.g. the color behind the text "A new option to be added" and "Enhancement in KB Page" in the [Item Page Sample](#)).

### Title Text

The color of the text displayed as the title in the body of the Item Page (e.g. the color of the text "Enhancement Request" in the [Item Page Sample](#)).

### Error Message Text

The color of the text displayed when no match is found for a Quick Search (e.g. the text "Sorry no match found for your search. Please click here to perform a new search." will be displayed when an invalid article number is entered into the Quick Search field on the Search Page.)

## Summary Section

### Title Background

The background color of the left column in the Summary section, which displays the field names (e.g. the color behind the text "PRN" and "Product" in the [Item Page Sample](#)).

### Title Text

The color of the text in the left column in the Summary section, which displays the field names (e.g. the color of the text "PRN" and "Product" in the [Item Page Sample](#)).

### Text Background

The background color of the right column in the Summary section, which displays the field values (e.g. the color behind the text "20" and "Microsoft" in the [Item Page Sample](#)).

### Body Text

The color of the text in the right column in the Summary section, which displays the field values (e.g. the color of the text "20" and "Microsoft" in the [Item Page Sample](#)).

## Body Section

### Title Text

The color of the text displayed as the name of each field included in the Body section (e.g. the color of the text "Description", "Title" and "Platform" in the [Item Page Sample](#)).

### Body Text

The color of the text displayed as the value of each field included in the Body section (e.g. the color of the text "A new option to be added" in the [Item Page Sample](#)).

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## Customizing the Style Sheet for the Item Page

A style sheet is used to determine the size, style and family of the fonts on the Item Page. You can use your own style sheet by placing a copy of your style sheet into the Styles directory of your workgroup's Knowledge Base files. Any color options set in the style sheet will be overridden by the settings in the [Color Preferences](#) section for the Item Page. The directory can be found at:

**<installation directory>/workgroup/KB/Styles**

where <installation directory> is the location where you installed your Tracker files. By default, the <installation directory> is at C:\inetpub\wwwroot\NetResultsTracker and *workgroup* is the name of the workgroup used as Knowledge Base.

Click on the **Style** button to the left of the Item Page to specify the name of your customized style sheet. In the **Style Sheet File Name** field, enter the name of your style sheet file in the format **FileName.Extension** as in the example **KBStyle6.css**, which is the style sheet used by default.

Check the box for the option **Apply to all pages** to apply the style sheet entered in the **Style Sheet File Name** field to all pages related to the Knowledge Base. Enabling this option will overwrite any other style sheets specified in the **Style** section for the Search and Results pages.

Click **OK** to save your selections.



There are several preferences that are applied to all areas of the Knowledge Base. These preferences include setting the workflow state where Knowledge base articles are published as well as selecting date and time formats.

### To set the Knowledge Base Preferences:

1. Login to Tracker as Admin
2. Click on the **Admin** icon
3. Click on the **Knowledge Base** button
4. Click on the **Preferences** button to the left of "All Pages"
5. Make selections for the preferences, then click **OK** to save your selections

The preferences that can be set for all Knowledge Base pages are described below:

### Knowledge Base Article Form

Select a form that should be used for creating and publishing articles to the Knowledge Base. The forms available for selection are based on the forms that have been created in the [Manage Forms](#) section.

### Articles from these Projects are visible

This option limits the articles that are published in the Knowledge Base to only those that have belong to one of the selected projects. The projects available are the projects associated with the form selected in **Knowledge Base Form**. More information can be found in the [Manage Projects](#) section.

### Articles in these State(s) are visible

Choose a state or a state group as the state(s) where articles are published to the Knowledge Base. When a Knowledge Base article has the Status field set to the state(s) selected for this preference, the article can be viewed using the Search Page -- it is available to all end users searching the Knowledge Base.

Multiple states can be selected for this preference by creating a [state group](#) in the [Managing Workflows](#) page of the Administration section and selecting the new state group for this preference.

### Date Format

Select the date format that should be used when displaying date fields in the Knowledge Base articles and related pages (Search, Results, and Item pages).

### Time Format

Select the time format that should be used when displaying date fields in the Knowledge Base articles and related pages (Search, Results, and Item pages). Selecting **12 Hour** will display the time using the numbers 1-12 to represent each hour. Choosing **24 hour** will display the time using the numbers 0-24 to represent each hour.

## Time Zone

Select the time zone that should be used when displaying date fields in the Knowledge Base articles and related pages (Search, Results, and Item pages). The list of available time zones is based on the operating system of the Tracker server machine. The following Help section contains the time zones for the server operating systems supported by Tracker: [Windows 2003 / 2000 Time Zones](#)

## Adjust to Daylight Saving Time (DST)

Checking the box here will enable the system to adjust the workgroup data to account for daylight saving time. If you selected a time zone for the workgroup where daylight saving time is observed, it is recommended that you enable this option.

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## Color Preferences

You can customize the color scheme of the Knowledge Base pages.

To set the color preferences for the Knowledge Base pages:

1. Login to the [workgroup](#) as Admin
2. Click on the **Admin** icon
3. Click on the **Knowledge Base** button
4. Click on the **Color** button to the left of "All Pages"
5. Make selections for each of the color preferences ([Description of preferences](#))
6. Click **OK** to save the changes

## Color Preference Options

The following color preferences can be set for the Knowledge Base pages:

## IE Browser Button Settings

These settings determine the colors of the buttons for users using the Internet Explorer (IE) browser.



## Use Default Buttons (& Inputs)

Checking the box for this option will apply the operating system's default color settings to the buttons for IE users. When this option is enabled, the rest of the IE Browser Button Settings are disabled.

## Gradient

Select a method for applying a gradient effect to the button color (e.g. "Bottom to Top" is the method selected in

the [IE Browser Buttons Sample](#)). Selecting "None" will not apply the gradient effect to the button color. This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Background

The color used in the background of the buttons in the Tracker pages (e.g. the light blue color behind the text "Click" on the button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Text

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Click" in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Border

The color of the border of the button in the Tracker pages (e.g. the color of the light blue border around the "Click" button in the [IE Browser Buttons Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

## Other Browser Button Settings

These settings determine the colors of the buttons for users using browsers other than Internet Explorer.



### Use Default Buttons (& Inputs)

Checking the box for this option will apply operating system's default color settings to the buttons for non-IE browsers. When this option is enabled, the rest of the Other Browser Button Settings are disabled.

### Background

The color used in the background of the buttons in the Tracker pages (e.g. the blue color behind the text "Click" on the button in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Text

The color of the text in the buttons in the Tracker pages (e.g. the color of the text "Click" in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

### Border

The color of the border of the button in the Tracker pages (e.g. the color of the black border around the "Click" button in the [Other Browser Button Sample](#)). This option will not be available when the option **Use Default Buttons (& Inputs)** is enabled.

## **Error Page Settings**

The following settings are applied to the error page should an error occur in the Knowledge Base.

### **Body Background**

The background color of the error page.

### **Body Title Font**

The color of the text displayed at the top (title) of the error page.

### **Border Background**

The color of the border displayed around the error information.

### **Left Pane Body Text**

The color of the text in the left pane of the error page.

# Windows 2003 / 2000 Time Zone Selection Chart

[Help Topics](#)

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The following is a list of time zones that are supported by Tracker when installed on a Windows 2003 / 2000 system. Entries with (\*) are only available in Windows 2003.

Time Zone Offset (in Hours)	Time Zone	System Time Zone (as displayed in Date/Time Settings)
-12:00	Dateline Standard Time	Eniwetok, Kwajalein
-11:00	Samoa Standard Time	Midway Is, Samoa
-10:00	Hawaiian Standard Time	Hawaii
-10:00	Alaskan Standard Time	Alaska
-08:00	Pacific Standard Time	Pacific Time (US & Canada); Tijuana
-07:00	Mexican Standard Time [La Paz] *	Chihuahua, La Paz, Mazatlan
-07:00	Mountain Standard Time	Mountain Time (US & Canada)
-07:00	Mountain Standard Time [Arizona]	Arizona
-06:00	Central Standard Time	Central Time (US & Canada)
-06:00	Mexico Standard Time	Mexico City, Tegucigalpa
-06:00	Canada Central Standard Time	Saskatchewan
-06:00	Central America Standard Time	Central America
-05:00	Eastern Standard Time	Eastern Time (US & Canada)
-05:00	Eastern Standard Time [Indiana (East)]	Indiana (East)
-05:00	SA Pacific Standard Time	Bogota, Lima, Quito
-04:00	Atlantic Standard Time	Atlantic Time (Canada)
-04:00	SA Western Standard Time	Caracas, La Paz
-04:00	Pacific SA Standard Time	Santiago
-03:30	Newfoundland Standard Time	Newfoundland
-03:00	SA Eastern Standard Time	Buenos Aires, Georgetown
-03:00	E. South America Standard Time	Brasilia
-03:00	Greenland Standard Time	Greenland
-02:00	Mid-Atlantic Standard Time	Mid-Atlantic

-01:00	Azores Standard Time	Azores
-01:00	Cape Verde Standard Time	Cape Verde Is
00:00	Universal Coordinated Time	Casablanca, Monrovia
00:00	Greenwich Mean Time	Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London
+01:00	Romance Standard Time	Amsterdam, CopenHagen, Madrid, Paris, Vilnius
+01:00	W. Central Africa Standard Time	West Central Africa
+01:00	Central European Standard Time	Belgrade, Sarajevo, Skopje, Sofija, Zagreb
+01:00	Central Europe Standard Time	Bratislava, Budapest, Ljubljana, Prague, Warsaw
+01:00	W. Europe Standard Time	Brussels, Berlin, Bern, Rome, Stockholm, Vienna
+02:00	Egypt Standard Time	Cairo
+02:00	South Africa Standard Time	Harare, Pretoria
+02:00	Israel Standard Time	Israel
+02:00	E. Europe Standard Time	Bucharest
+02:00	FLE Standard Time	Helsinki, Riga, Tallinn
+02:00	GTB Standard Time	Athens, Istanbul, Minsk
+03:00	Arab Standard Time	Kuwait, Riyadh
+03:00	E. Africa Standard Time	Nairobi
+03:00	Arabic Standard Time	Baghdad
+03:00	Russian Standard Time	Moscow, St. Petersburg, Volgograd
+03:30	Iran Standard Time	Tehran
+04:00	Arabian Standard Time	Abu Dhabi, Muscat
+04:00	Caucasus Standard Time	Baku, Tbilisi
+04:00	Afghanistan Standard Time	Kabul
+05:00	West Asia Standard Time	Islamabad, Karachi, Tashkent
+05:00	Ekaterinburg Standard Time	Ekaterinburg
+05:30	India Standard Time	Bombay, Calcutta, Madras, New Delhi
+05:45	Nepal Standard Time	Kathmandu
+06:00	Central Asia Standard Time	Almaty, Dhaka

+06:00	Sri Lanka Standard Time	Columbo
+06:00	N. Central Asia Standard Time	Almaty, Novosibirsk
+06:30	Myanmar Standard Time	Rangoon
+07:00	SE Asia Standard Time	Bangkok, Hanoi, Jakarta
+07:00	North Asia Standard Time	Krasnoyarsk
+08:00	China Standard Time	Beijing, Chongqing, Hong Kong, Urumqi
+08:00	W. Australia Standard Time	Perth
+08:00	Singapore Standard Time	Singapore
+08:00	Taipei Standard Time	Taipei
+08:00	North Asia East Standard Time	Irkutsk, Ulaan Bataar
+09:00	Tokyo Standard Time	Osako, Sapporo, Tokyo
+09:00	Korea Standard Time	Seoul
+09:00	Yakutsk Standard Time	Yakutsk
+09:30	AUS Central Standard Time	Darwin
+09:30	Cen. Australia Standard Time	Adelaide
+10:00	AUS Eastern Standard Time	Canberra, Melbourne, Sydney
+10:00	E. Australia Standard Time	Brisbane
+10:00	West Pacific Standard Time	Guam, Port Moresby
+10:00	Tasmania Standard Time	Hobart
+10:00	Vladivostok Standard Time	Vladivostok
+11:00	Central Pacific Standard Time	Magadan, Solomon Is, New Caledonia
+12:00	Fiji Standard Time	Fiji, Kamchatka, Marshall Is
+12:00	New Zealand Standard Time	Auckland, Wellington
+13:00	Tonga Standard Time	Nuku'alofa



Our Knowledge Base (KB) section is updated quite often. For the latest information, available 24 hours a day, 7 days a week, please browse to the [NetResults Tracker Knowledge Base](#) on our web site. It is likely that you will find the answer to your question or resolution (or workaround) to a problem in the Knowledge Base. We also have a [Frequently Asked Questions](#) section which contains commonly asked questions and their answers.



If you are unable to resolve a problem after searching the [Knowledge Base](#) section of our web site, and you are evaluating the product or have a current support agreement with NetResults, please contact us via email. Standard support is available via email on business days (Monday through Friday, excluding holidays). You should receive a response within one business day. [Additional support options](#) (e.g. phone support, extended hours) may be purchased from NetResults. Phone support is not included with the product, it must be purchased separately.

For the appropriate support email address, standard support hours, and a list of information to send us for fastest resolution to your problem, please [click here](#). If for some reason you are unable to reach our site via the web, please send your support email to

[support@nrtracker.com](mailto:support@nrtracker.com)

In your email please be sure to include the following information (emails with this information are generally given priority over those without):

1. Version of Tracker you are using (e.g. 6.0.0, 5.5, 5.0).
2. Web Server software being used (e.g. IIS 6, IIS 5).
3. Database being using (e.g. MS Access, MS SQL Server 2000/2005, Oracle 9i/10g).
4. Operating System of the server on which Tracker is installed (e.g. Windows 2000 Server, Windows Server 2003).
5. Web Browser software being used (e.g. IE 5.5/6, Firefox 1.5/2.0).
6. **The full text of any error message which is displayed.** In many cases if you get a generic database error message, you can scroll further down on the page to find more detailed error information.
7. **The steps required to reproduce the problem.**
8. Whether you are an evaluator or licensed user with support.
9. Attach the following files from your installation to your message:
  - o All files present in the installation log folder where you installed Tracker. By default, the files can be found in C:\NetResultsLog.
  - o If your problem is related to the Workgroup Management System, attach the file called ptadminlog.txt that can be found in the "pttmp" folder of your web server directory. By default, this file can be found at C:\inetpub\wwwroot\NetResultsTracker\pttmp\ptadminlog.txt.
  - o If your problem is related to email notification messages, attach the file called emaillog.txt that can be found in the "pttmp" folder of your web server directory. By default, this file can be found at C:\inetpub\wwwroot\NetResultsTracker\pttmp\emaillog.txt.
  - o For all other problems, attach all the files that can be found in the "pttmp" folder of your web server directory. By default, this directory can be found at C:\inetpub\wwwroot\NetResultsTracker\pttmp.

Please be as specific as possible in your description of what is wrong. Including steps to reproduce the problem and the full text of all error messages is very helpful and can significantly reduce the amount of time it takes to resolve a problem.