NetResults Tracker Help

User Management System Guide Help Topics

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User Management Overview

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The User Management System (UMS) allows you to add and maintain users for all workgroups in a central interface. The number of users that can be added to UMS depends on the number and type of licenses you have entered in the [License Manager](). Once your users have been created and given access to specific workgroups using the UMS operations below, your users can begin using Tracker.

The following are the user operations available in UMS:

- [Home Page and User List]()
- [License Summary]()
- [Adding a User]()
- [Viewing a User]()
- [Editing a User]()
- [Deleting a User]()
- [Editing Workgroup User Access]()
- [Administration Options]()

Individual sections of this Help documentation can also be accessed from within the User Management System by clicking on the Help link in the upper right corner of each page.

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User Management System Guide Glossary

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Glossary of Terms

Access - The operation for editing workgroup user access. You can edit the list of users in a workgroup or you can edit the list of workgroups foir a user.
More information: Editing Workgroup User Access

Add - The operation for creating a new user account in UMS.
More information: Adding a User

Admin - Options that allow the UMS Administrator to reset the password, set preferences, set rights for workgroup Administrators and synchronize user information.
More information: Administration Options

Delete - The operation for deleting a user account in UMS.
More information: Deleting a User

Edit - The operation for editing a user account in UMS. User profile information, license type and user type can be modified.
More information: Editing a User

Help - Clicking on this icon in the top button bar will display the UMS 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: UMS Help Guide Table of Contents

Home Page - The page the UMS Administrator first sees when logging into UMS. A list of all user accounts is displayed on the Home Page. You can also search for specific users.
More information: Logging In

License Manager - The interface that shows your Tracker license information. The License Manager shows what type of licenses and how many of each type you have purchased.
More information: License Manager

License Summary - A breakdown of the number of user accounts and floating user sessions currently in each workgroup and the maximum number of user accounts and floating user sessions allowed in your installation.
More information: License Summary

Login to UMS - The operation used to access UMS.
More information: Logging In

Logoff - Clicking on this icon in the top button bar will end your UMS session.

Search - The operation on the Home Page that allows you to search for users by keyword or using workgroups, user fields or license type as a filter.
More information: Logging In

Session - A session is started when a user logs into a workgroup. The session ends when a user logs off or is logged off by an

Administrator. A list of user sessions for each workgroup can be viewed in UMS.
More information: License Summary

UMS Administrator - The user account for accessing UMS. The User ID of the UMS Administrator is "useradmin".
More information: Overview

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

View - The operation for viewing a user account or viewing the list of users associated with a workgroup.
More information: Viewing a User or Workgroup User List

WMS Administrator - The user account for accessing WMS. The User ID of the WMS Administrator is "ptadmin".
More information: Logging In

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

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Logging In

To login to the User Management System (UMS), browse to the following URL:

http://*localhost*/ptcommon/gumslogin.asp

localhost indicates the web server of the local machine. To access the User Management System from a remote machine, the URL is:

http://*servername*/ptcommon/gumslogin.asp

servername indicates the TCP/IP host name of the machine where Tracker is installed.

In both cases, you can omit the "/gumslogin.asp" at the end as we have configured gumslogin.asp (the login page) as the default page for the ptcommon application.

When you are presented with the User Management System Login Page, enter **useradmin** as the User ID and the corresponding password to login. The initial **useradmin** password is "useradmin". It is recommended that you change this default password during your first login session. Information on changing your password is available in the Administration Options section.

Home Page

After logging in, the first screen you will see is the User Management System Home Page.

Home	Add	View	Edit	Delete	Access	Admin	EXIT Logoff	Help

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Status **Ready**   Help

User Management System (UMS) - Home

Print | Export

Search: [   ] [Go] [Clear]

[−] Workgroup: <All>   User Fields: <All>   License Type: <All>

Workgroup	User Fields	License Type
<All>	<All>	<All>
chgnmgmt	User ID	Static
KB	Name	Floating
nrtracker1	Email	Restricted

User Accounts: 12   License Summary: Static: 12/20   Floating: 0/0   Restricted: 0/0   Floating Sessions: 0/0   Page [1] of 2 ▷

Action	User ID	Full Name	Email	Company	License Type	Recent Login Workgroup	Recent Login Time
🗐 🗑 ✗ 🗐	bld_mgr	Build Manager	bld_mgr@ourcompany.com	Our Company. Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	dev_mgr	Development Manager	dev_mgr@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	dev_one	Developer One	dev_one@ourcompany.com	Our Company, Inc.	Static	nrtracker1	06/04/2009 04:04:16 PM
🗐 🗑 ✗ 🗐	dev_two	Developer Two	dev_two@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	process_mgr	Process Manager	process_mgr@ourcompany.com	Our Company, Inc.	Static	KB	06/04/2009 04:06:02 PM
🗐 🗑 ✗ 🗐	pubs_mgr	Publications Manager	pubs_mgr@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	qa_mgr	QA Manager	qa_mgr@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	qa_one	QA Engineer One	qa_one@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	qa_two	QA Two	qa_two@ourcompany.com	Our Company, Inc.	Static	Unknown	Unknown
🗐 🗑 ✗ 🗐	sup_mgr	Support Manager	sup_mgr@ourcompany.com	Our Company, Inc.	Static	support	06/04/2009 04:05:10 PM

Page [1] of 2 ▷

This page shows a list of user accounts in the system. Certain actions, such as viewing, editing, deleting and granting workgroup access to user accounts, can be done using icons to the left of each user account. Other actions can be done using the icons in the Button Bar. At the top of the page, you can perform a search for user accounts based on a keyword.

Searching for Users

You can search for user(s) using the Search section at the top of the User Management System Home Page. To search:

1. Login to the User Management System
2. Enter a keyword to search for the user account(s) you wish to find. Examples of keywords are User ID, First Name, Last Name, Full Name, Email Address or Company Name.
3. You can narrow down the search by using the workgroups, user fields or license types as filters. To use filters in your search, click **[+]**. To hide the filters, click **[-]**.
   - If you wish to limit the search to only user accounts that are added or have access to a certain workgroup(s), click on a workgroup(s) in the

Workgroup field

- If you wish to limit the search so the keyword is only located in certain fields in the user's profile information, select a field(s) in **User Fields**
- If you wish to limit the search to only user accounts that are of a certain license type(s), click on a license type(s) in the **License Types** field

To make multiple selections in the filters, hold down the Ctrl button on your keyboard while making your selections.

4. Click on the **Go** button to retrieve the results of your search

Click on the **Clear** button to reset the text and selection boxes with the search criteria that was last used. To remove any previously entered criteria from the text box, click on the **Home** icon.

User List

A list of active users are displayed in the User Management System Home Page.

 License Summary

Above the list, a total number of user accounts is displayed as **User Accounts**. Click on the License Summary link to see the number of user accounts by license type present in each workgroup. The number of user accounts created and the maximum allowed number of user accounts for each license type is also displayed above the user list. For example, in the Home Page image above the text **Static: 13/25** indicates that there are 13 static user accounts present in the system and up to 25 static user accounts can be created in the system based on the licenses installed.

The User List shows the following information for each account:

User ID
User ID for the user account

Full Name
First and Last Name for the user account

Email Address
Email Address associated with the user account

Company
Name of the company associated with the user account

License Type
License type for the user account

Recent Login Workgroup
The workgroup the user most recently logged into

Recent Login Time
The date and time the user most recently logged into Tracker

Printing the User List

The users displayed on the User List can be printed using the **Print** link in the upper right corner of the User List pages. Only the users currently displayed on the list will be printed (e.g. if you have run a search for a particular set of users, only those users will be printed as opposed to the full set of users).

Exporting the User List

The users displayed on the User List can be exported to *.csv format (comma separated values) using the **Export** link in the upper right corner of the User List pages. You can then open this file in another tool such as Microsoft Excel or Crystal Reports. Only the users currently displayed on the list will be exported (e.g. if you have run a search for a particular set of users, only those users will be exported as opposed to the full set of users).

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License Summary

The License Summary section displays workgroup information such as the number of users per license type added to each individual workgroup.

To access a summary of the number of accounts per license type associated with each workgroup:

1. Login to the User Management System (UMS)
2. Click on the **License Summary** link at the top of the User List on the UMS Home Page

The table displayed in the License Summary section includes the following items:

- **Static User Accounts (Active / Max Allowed)**
  The first number (**Active**) is the number of static user accounts that are currently added in the workgroup's User Accounts section. The second number (**Max Allowed**) is the maximum number of user accounts that can be created in the User Management System (UMS) with **Static** selected as the license type. This limit is equal to the number of users entered for the Static License Key in the License Manager.

- **Floating User Sessions (Active / Max Allowed)**
  The first number (**Active**) is the number of floating user accounts currently logged into the workgroup. The second number (**Max Allowed**) is the maximum number of floating user accounts that can be logged into Tracker at any given time. This limit is equal to the number of users entered for the Floating License Key in the License Manager.

- **Floating User Accounts (Active / Max Allowed)**
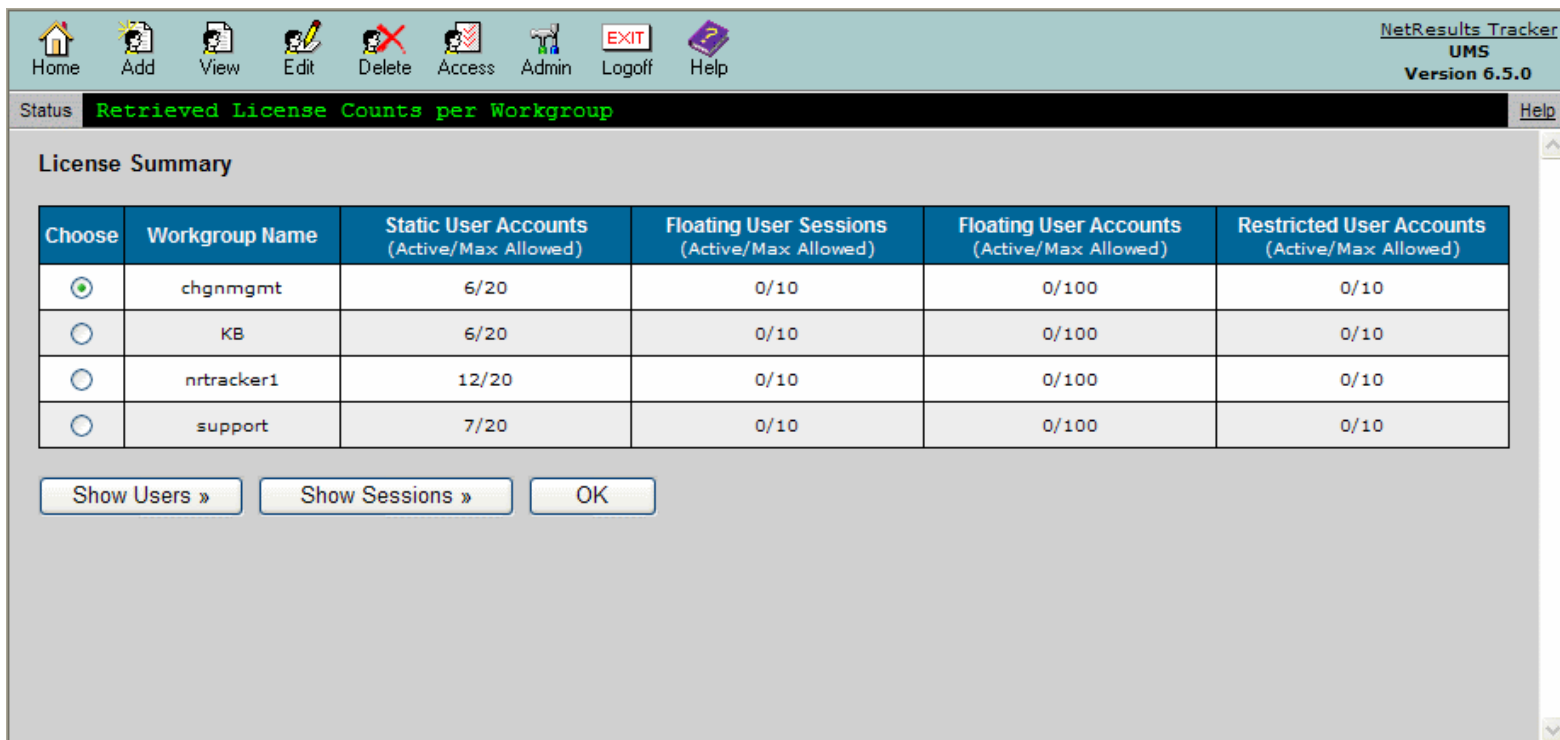 The first number (**Active**) is the number of floating user accounts that are currently added in the workgroup's User Accounts section. The second number (**Max Allowed**) is the maximum number of user accounts that can be created in UMS with **Floating** selected as the license type. This limit is 10 times the number of maximum floating user sessions listed above. For example, if the maximum number of floating user sessions is 5, then the maximum number of floating user accounts is 50. This indicates that although there are 50 user accounts with the floating license type, only 5 of these user accounts can be logged in concurrently.

- **Restricted User Accounts (Active / Max Allowed)**
  The first number (**Active**) is the number of restricted user accounts that are currently added in the workgroup's User Accounts section. The second number (**Max Allowed**) is the maximum number of user accounts that can be created in UMS with **Restricted** selected as the license type. This limit is equal to the number of users entered for the Restricted License Key in the License Manager.

Show Users Associated with a Workgroup

To see the individual User IDs associated with a particular workgroup in the License Summary table, select the radio button to the left of the workgroup name, then click on the **Show Users** button.

- **Static User Accounts**
  The User IDs with **Static** selected as the license type which have been added to the workgroup (and are present in the workgroup's User Accounts section). The number of active static user accounts and maximum allowed static user accounts are listed in the column heading.

- **Active Floating User Sessions**
  The User IDs with **Floating** selected as the license type that are currently logged into the workgroup. The number of active floating user sessions and maximum allowed floating user sessions are listed in the column heading.

- **Floating User Accounts**
  The User IDs with **Floating** selected as the license type which have been added to the workgroup (and are present in the workgroup's User Accounts section). The number of active floating users and maximum allowed floating user accounts are listed in the column heading.

- **Restricted User Accounts**
  The User IDs with **Restricted** selected as the license type which have been added to the workgroup (and are present in the workgroup's User Accounts section). The number of active restricted user accounts and maximum allowed restricted user accounts are listed in the column heading.

Show User Sessions for a Workgroup

You may wish to view and / or logoff the active user sessions for a workgroup.

To **show** a list of active user sessions for a workgroup:

1. Login to the User Management System (UMS)
2. Click on the **License Summary** link at the top of the User List on the UMS Home Page
3. Select a radio button to the left of a workgroup, then then click on the **Show Sessions** button
4. A list of all active sessions will be displayed. The User ID, full name, and license type will be displayed for each session. To logoff a user session, click on the user session to highlight it, then click on the **Logoff** button. By holding down the **Ctrl** or **Shift** key on your keyboard, you can select multiple user sessions.
5. Click **OK** to confirm this operation
6. Click on the **OK** button to return to the **License Summary** section

The figure below shows an example of the User Sessions list.

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Status | Active User Sessions in the selected Workgroup(s) | Help

User Sessions

Active User Sessions

Workgroup: nrtracker1
process_mgr (Process Manager / Static)
qa_mgr (QA Manager / Static)

OK | Logoff

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Adding a User

Constraints to Consider before Adding a User

A user account must be created in the User Management System (UMS) section before the user can begin using Tracker. The number of users that can be added to UMS depends on the number and type of licenses you have entered in the License Manager. Each user created in UMS can be given access to multiple workgroups.

When adding a new user, the profile information (email address, phone number, etc.) can be entered. This profile information will be displayed in all workgroups to which the user is given access. When entering information for a new user account, consider the character set of the workgroup(s) the user will be accessing. A user can only be given access to a workgroup with a character set that supports the characters entered in the user's profile. For example, if a user is created with UTF-8 characters in the profile, this user account can only be given access to a workgroup with UTF-8 selected as the character set.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets (all workgroups) support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character sets.
- As mentioned above, if a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

For information on checking a workgroup's character set, review the Viewing a Workgroup section. To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

Adding a User

Users can be added from the User Management System (UMS). The option of allowing workgroup Administrators to add users to their own workgroup(s) without requiring access to UMS can be enabled in the Administration Options section.

The following are the steps that need to be done in order to add a new user and allow this user to begin using Tracker:

1. Add a user to the User Management System (UMS) using the steps below
2. Give the user access to the necessary workgroup(s) using the Editing a User's Access to Workgroups option
3. For each workgroup that the user will access, add the user to the User Accounts page of the Admin section in the workgroup. This step can be skipped if the "Add User + Access" option is used when giving the user access to a workgroup(s) in the step above.

To **add** a new user:

1. Login to the User Management System
2. Click on the **Add** icon in the top button bar
3. Enter information into the following required fields on the "Add New User Account" page:
    - **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.

      This password is not used if the user is only given access to a workgroup(s) with Active Directory Integration enabled because the user's Windows user account information will be used for authentication. In this case, a password is still required for creating a new user account in case the workgroup(s) to which the user has access are ever changed to allow Anonymous access. This password does not need to match the user's Windows account password.

    - **Confirm Password**
      Confirm the login password for user as entered in the Password field above

    - **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.

    - **User Type**
      This option will only be present if the user account option Enable User Type Property has been enabled in the Set User Account Options

section. This property for user accounts has been deprecated and is planned to be removed from a future release. It is possible to use user group privileges to achieve the same effect as the User Type property.

User Type can be either Internal or External. A user with **External** selected as the user type cannot be assigned to any record (these users are not listed in the **Assigned To** pulldown for selection during the workflow process in the workgroups). If **Restricted** is selected as the License type above, you must select **External** as the User Type.

- **Company**
  User's company name

- **Email**
  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

4. After entering the information, click on the **Add User** button to save this new user account.
5. A confirmation will be displayed after the user is successfully added. Click on the **Add Workgroup Access** button to specify which workgroups this user will be able to access. Details on giving a user access to a workgroup(s) can be found in the Editing a User's Access to Workgroups Help section.
6. After a user is given access to a workgroup, the user must be added to the User Accounts section of each workgroup. Only after doing this will the user will be able to login to the workgroup(s) and begin using Tracker. It is possible to add a user to the workgroup at the same time as access is given. Review the Editing a User's Access to Workgroups Help section for details.

The information entered in a user's profile can be viewed by users when the **Assigned To** or **Reported By** fields are displayed on the View page or in the Home Page and Query reports. The user's name will appear as a clickable link for those users which have the **View User Information** privilege. Clicking on the user's name will display the details present in the user's profile.

Restoring a User

If you add a user account with a User ID that matches a previously deleted user account, you will be prompted to restore the user account by clicking on the **Restore User** button or to choose a different User ID by clicking on the **Cancel** button to return to the **Add New User Account** page.

Managing Users within License Limits

If you attempt to add more users than are allowed by your license(s), Tracker will notify you that you have reached the maximum number of users for your license type. If you have more than one type of license (a mix of static, floating, or restricted licenses), the error will tell you which license type has reached its limit. You will need to delete another user account before you are allowed to create a new user account.

Definition of Users by License Type

There are three types of licenses available for use with Tracker: Static, Floating, and Restricted. For all three license types only one user (person) may be logged in to Tracker per license. In other words, the maximum number of people that may be logged in to Tracker at any one time is equal to the total number of Static, Floating, and Restricted licenses you have. The difference between the license types is how many user accounts may be created per license and what Tracker features may be used.

- **Static**
  One user account (User ID) may be created for each Static license. Since there is only one user account per license, users with Static accounts can always log in to Tracker. Static licenses are typically used for people who regularly use Tracker and therefore must be guaranteed access at any time.

  Static users are also referred to as "Unrestricted" or "Non-restricted" users in various areas of the Help Guides.

- **Floating**

  Up to ten (10) user accounts (User IDs) may be created for each Floating license. However, only one user per Floating license may be logged in to Tracker at any given time. Others who try will be denied access until another Floating license user logs off (clicks the Logoff icon). For instance, if you have 5 Floating licenses, you can have up to 50 Floating user accounts, but no more than 5 of those 50 users may be logged in to Tracker at the same time. 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). Although you can create up to ten user accounts per Floating license, we generally recommend one Floating license for every 2-3 users to minimize the number of times users can not log in because all Floating licenses are in use.

  Floating users are also referred to as "Unrestricted" or "Non-restricted" users in various areas of the Help Guides.

- **Restricted**

  One user account (User ID) may be created for each Restricted license. Since there is only one user account per license, users with Restricted accounts can always log in to Tracker. However, unlike the Static and Floating license types, users with Restricted user accounts can only perform a very limited number of Tracker operations. They are only allowed to Add new records (report issues), View, Task and Edit records that they previously added (check status and update issues they have reported), receive email notifications and alerts, participate in discussions and run text reports (saved queries) on the Home page to view summaries of records they have added. A Restricted user can not perform any other operations (such as Delete, Query, Metrics, History, etc.); cannot be the Assignee for a record; cannot view information about source code files; cannot start discussion threads or set alert settings and cannot view any records which she did not Add. Restricted licenses are typically used for external users who only need to submit issues to Tracker and track the progress of these issues. For example, if you have a large number of customers who only submit reports to your Support organization very infrequently, you could give those users Restricted licenses.

For more details on licensing including your License Agreement and the number and type of license(s) you have, please run the License Manager.

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Viewing a User or Workgroup User List

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You can use the View User operation to review a user's profile information or to review a list of users in a workgroup.

To **view** a user account:

1. Login to the User Management System
2. Click on the **View** icon to the left of the user account on the UMS Home Page
   or
   Click on the **View** icon to the left of the user account in the results of a user search
   or
   Click on the **View** icon in the top button bar, select the radio button to the left of the option **User**, select a user in the pulldown and click on the **View** button

The user's profile information will be displayed:

- **User ID**
  Unique identifier for user

- **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](#) in the Adding a User section 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.

- **User Type**
  This option will only be present if the user account option [Enable User Type Property](#) has been enabled in the Set User Account Options section. This property for user accounts has been deprecated and is planned to be removed from a future release. It is possible to use [user group privileges](#) to achieve the same effect as the User Type property.

  User Type can be either Internal or External. A user with **External** selected as the user type cannot be assigned to any record (these users are not listed in the **Assigned To** pulldown for selection during the workflow process in the workgroups). If **Restricted** is selected as the License type above, you must select **External** as the User Type.

- **Company**
  User's company name

- **Email**
  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**
  User's state

- **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

- **Character Set**
  The character set that supports the characters entered into the user's profile information. This determines to which workgroups the user can be given access. Review the [Adding a User](#) section for details on how a user's character set affects their workgroup access.

The workgroups to which the user has been given access or added are displayed in the **Workgroups Associated with User - <User ID>** section of View User Account page. Information included in this section:

- **Workgroup Name**
  Name of the workgroup to which the user has been given access or added. Clicking on the workgroup name will display the **Associated User Accounts** list for the workgroup.

- **Has Access?**
  "Yes" denotes that the user has been given access to the workgroup. "No" denotes that the user does not have access to the workgroup.

- **Is Added?**
  "Yes" indicates that the user is currently added to the workgroup and is displayed in the [workgroup's User Accounts](#) section. "No" indicates that the user is not currently added to the workgroup and is not available in the [workgroup's User Accounts](#) section.

- **Date Added**
  The date the user was added to the workgroup. If "Unknown" is displayed, this indicates that the user was added when the workgroup was created (a standard user included in the workgroup's template) or the user has not been added to the workgroup.

- **Date Deleted**
  The date the user was deleted from the workgroup. If "Unknown" is displayed, this indicates that the user has not been deleted from the workgroup.

- **Date Restored**
  The date the user was restored to the workgroup. A user can be restored by adding the user to a workgroup in which the user has been previously deleted. "Unknown" indicates that the user has not been restored.

- **Last Login Time**
  The date and time the user last logged into the workgroup. "Unknown" indicates that the user has never logged into the workgroup.

Viewing a Workgroup User List

The View operation can be used to display all users associated with a workgroup. A user is associated with a workgroup when it has been given access or added to a workgroup.

To **view** a workgroup user list:

1. Login to the User Management System
2. Click on the View icon in the top button bar
3. Select the radio button to the left of the **Workgroup** option, select a workgroup in the pulldown and click on the **View** button

Information for each associated user account is displayed on the **User Accounts in Workgroup - <workgroup>** page:

- **User ID**
  The User ID of the user account. Clicking on the User ID will display the **View User Account** page for the user account.

- **Full Name**
  The first and last name of the user account

- **License Type**
  Can be Static, Floating, or Restricted. See Definition of Users by License Type in the Adding a User section for further information.

- See the Associated Workgroups section above for details on the remaining items listed for each user in the Associated User Accounts page.

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Editing a User

The information stored in a user account can be modified to change the profile information or to change the license or user type of the account.

Users can be edited from the User Management System (UMS). The option of allowing workgroup Administrators to edit users in their own workgroup(s) without requiring access to UMS can be enabled in the Administration Options section.

To **edit** a user account:

1. Login to the User Management System (UMS)
2. Click on the **Edit** icon to the left of a user account on the UMS Home Page
   or
   Click on the **Edit** icon to the left of a user account in the User Search results
   or
   Click on the **Edit** icon in the top button bar, select a user account in the pulldown and click on the **Edit** button
3. Make any desired changes to the user profile information. You can edit any of the values except for the **User Character Set**.

   The **New Password** is not used if the user is only given access to a workgroup(s) with Active Directory Integration enabled because the user's Windows user account information will be used for authentication. In this case, a password is still required for creating a new user account in case the workgroup(s) to which the user has access are ever changed to allow Anonymous access. This password does not need to match the user's Windows account password.

   The User Type property will only be present if the user account option Enable User Type Property has been enabled in the Set User Account Options section. This property for user accounts has been deprecated and is planned to be removed from a future release. It is possible to use user group privileges to achieve the same effect as the User Type property.

4. Click on the **Update** button to save your changes
5. A confirmation of the operation will be displayed. Any changes to the user account will be updated in the workgroups to which the user has access.

The User Character Set listed in a user account is set based on the characters entered in the rest of the fields in the user's profile information. For example, if characters that are only supported by the UTF-8 character set are present in a user's profile, the User Character Set will be updated to reflect UTF-8. The User Character Set determines which workgroups a user can access because the User Character Set must be compatible with the workgroup's character set. For example, if a user is created with UTF-8 characters in the profile, this user account can only be given access to a workgroup with UTF-8 selected as the character set.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets (all workgroups) support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- As mentioned above, if a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

Edit User Account - process_mgr

User ID	process_mgr
New Password	
Confirm New Password	
Last Name	Manager
First Name	Process
License Type	Static
Company	Our Company, Inc.
Email	process_mgr@ourcompany.com
Phone	
Fax	
Address 1	
Address 2	
City	
State/Province	
Zip/Pincode	
Country	
Comment	
User Character Set	ISO-8859-1

Synchronizing User Details

User details may need to be synchronized in a workgroup if for some reason a workgroup's database cannot be updated when a user is edited in the User Management System (UMS) or in another workgroup. For example, let's say a user account is updated using the Edit User operation in UMS, but the database for a workgroup where this user is added is unavailable (e.g. it is a SQL Server database and the SQL Server is stopped). During the Edit User operation, the warning message below will be displayed noting that the user details could not be updated for all workgroups. The Synchronize User Details operation should be used to update the workgroups noted in the warning message.

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Status Success - Updated User Details for 'sup_one' Help

Edit User Account - sup_one

Result
You have successfully updated the user details for **sup_one** user.

Workgroup Name	Status
1. nrtracker1	Not Updated
2. support	Updated
User details have not been updated to some workgroups. Above table shows status for each workgroup in which the user is added. Please go to administration section page and choose Synchronize Users option to update user details for workgroups that are not updated.	

OK

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Deleting a User

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If a user has been added to the one or more workgroups, the user must be deleted from the [User Accounts](#) section of each workgroup before the user account can be deleted from the User Management System (UMS).

The option of allowing workgroup Administrators to delete users from their own workgroup(s) without requiring access to UMS can be enabled in the [Administration Options](#) section.

To **delete** a user account from UMS:

1. Login as Admin to the [workgroup](#) where the user is added
2. Click on the **Admin** icon
3. Click on the **User Accounts** link
4. Click on the **Delete** button to the left of the user account. If the user is assigned to any records, you will be prompted to select another user as a replacement to be the assignee for these records.
5. Repeat the above steps to delete the user account from the User Accounts section of any other workgroups where the user has been added
6. Login to [UMS](#)
7. Click on the **Delete** icon to the left of the user account on the UMS Home Page
   or
   Click on the **Delete** icon to the left of the user account in the User Search results
   or
   Click on the **Delete** icon in the top button bar, select a user in the pulldown, click on the **Delete** button and click OK to confirm the operation
8. A confirmation page will be displayed

NetResults Tracker Help

Editing Workgroup User Access

Before a user can login and begin using Tracker, the user must be given access to the workgroup(s) using the steps listed below and must be added to the workgroup's User Accounts section.
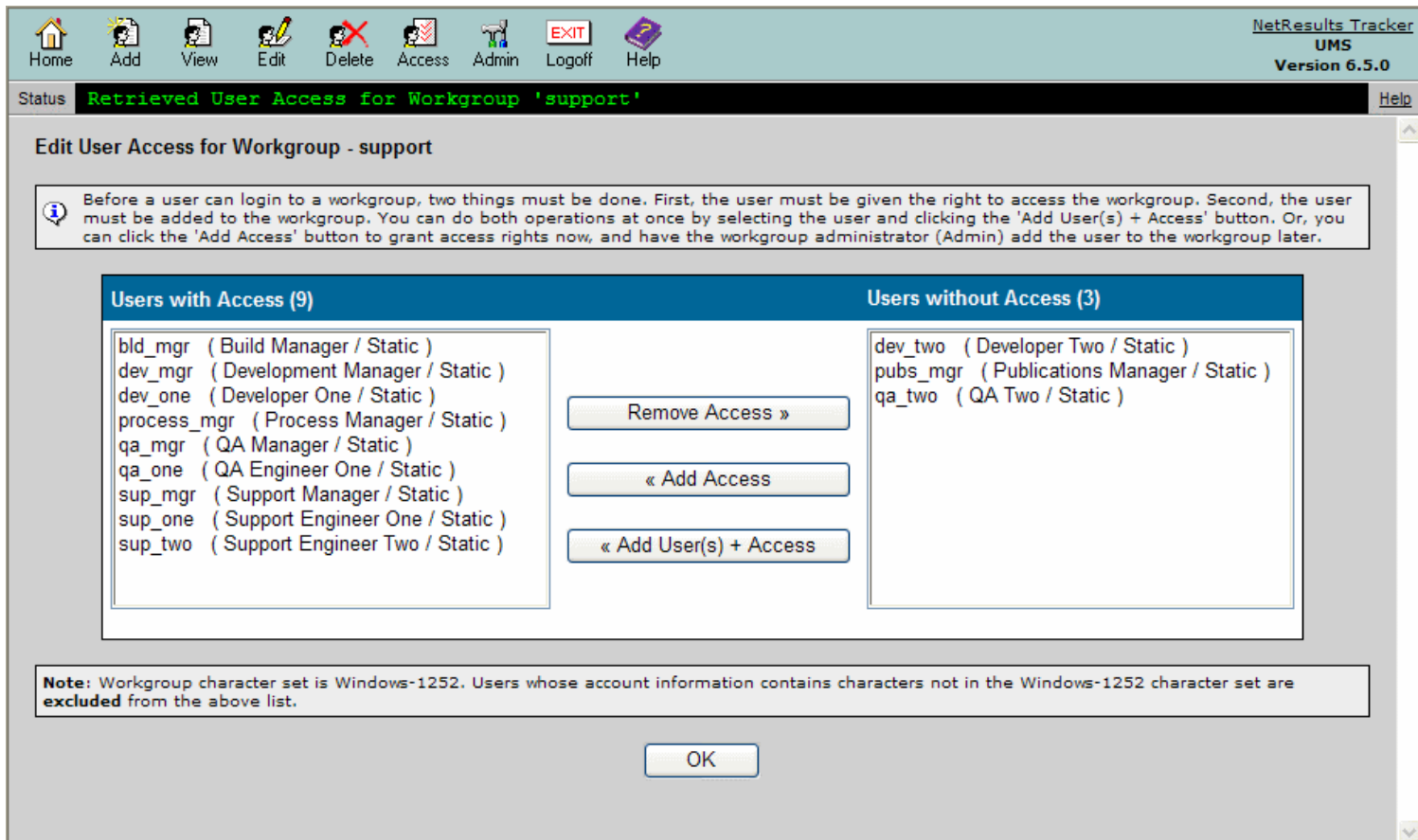
There are two ways to grant a user access to a workgroup. Click on the link to see the detailed instructions for each method:

- Select a workgroup and modify the list of users that have access

  OR

- Select a user and modify the list of workgroups he or she can access

Edit a Workgroup's List of Users

To select a workgroup and **edit the list of users that have access to the workgroup**:

1. Login to the User Management System (UMS).
2. Click on the **Access** icon in the top button bar
3. Select the radio button to the left of the **Workgroups** pulldown, select a workgroup, then click on the **Edit** button

4. The left column called **Users with Access** displays any users which have already been given access to the workgroup. It also includes a count of the number of users displayed in the column. The right column called **Users without Access** displays users that do not have access to the workgroup and has a count of the number of users displayed in the column.

   You can perform one of the following actions. To select multiple users for any of the actions below, hold down the **Ctrl** button on your keyboard as you select the users:

   - You can give a user(s) access to the workgroup by selecting a user(s) in the Users without Access column, then clicking on the **Add Access** button. This will only give the user(s) access to the workgroup. As mentioned in further detail in the Note below, a user will only be able to log into a workgroup after they have been given access **AND** added to a workgroup's User Accounts section.
   - You can give a user(s) access to the workgroup and add the user(s) to the workgroup's User Accounts section by selecting a user(s) in the Users without Access column, then clicking on the **Add User + Access** button.
   - You can remove a user's access to a workgroup by selecting a user(s) in the Users with Access column, then clicking on the **Remove Access** button

Edit a User's Access to Workgroups

To select a user and **edit the list of workgroups that the user can access**:

1. Login to the User Management System (UMS).
2. Click on the **Access** icon to the left of the user account on the UMS Home Page
   or
   Click on the **Access** icon to the left of the user account in the User Search results
   or
   Click on the **Access** icon in the top button bar, select the radio button to the left of the **Users** pulldown, select a user and click on the **Edit** button

3. The left column called **Has Access to Workgroups** displays any workgroups to which the user has already been given access. It also includes a count of the number of workgroups displayed in the column. The right column called **Available Workgroups** displays workgroups to which the user does not have access. It also includes a count of the number of workgroups displayed in the column.

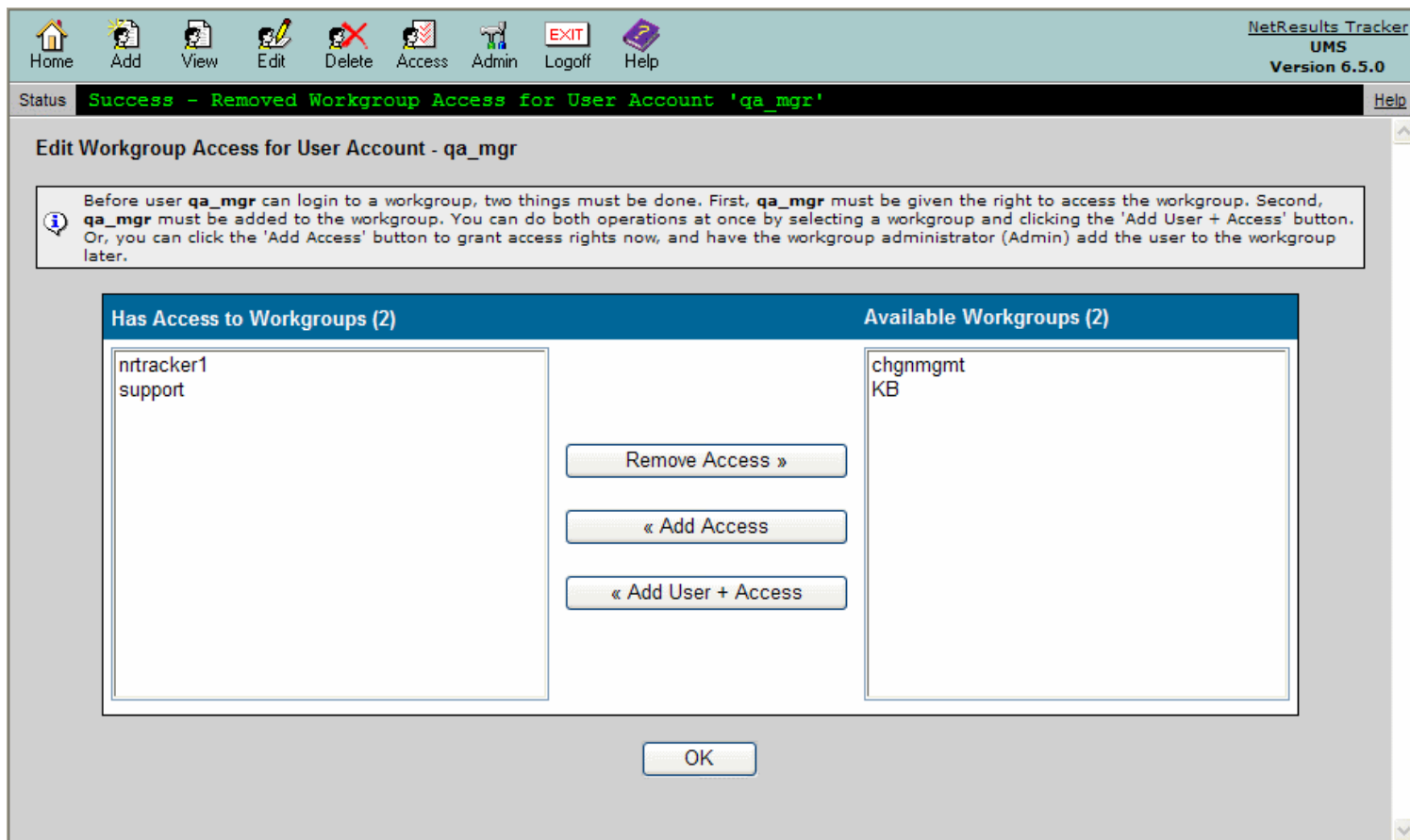   You can perform one of the following actions. To select multiple workgroups for any of the actions below, hold down the **Ctrl** button on your keyboard as you select the workgroups:

   - You can give a user access to a workgroup(s) by selecting a workgroup(s) in the Available Workgroups column, then clicking on the **Add Access** button. This will only give the user access to the workgroup(s). As mentioned in further detail in the Note below, a user will only be able to log into a workgroup after they have been given access **AND** added to a workgroup's User Accounts section.
   - You can give a user access to a workgroup(s) and add the user to the workgroup's User Accounts section by selecting a workgroup(s) in the Available Workgroups column, then clicking on the **Add User + Access** button.
   - You can remove a user's access to a workgroup(s) by selecting a workgroup(s) in the Has Access to Workgroups column, then clicking on the **Remove Access** button

 Note: Users with access rights to a workgroup may still not be able to login to the workgroup if the workgroup administrator has never added the user to the workgroup's User Accounts section. A user must both have access rights to the workgroup **and** be a part of the workgroup (the workgroup administrator must use the Add User operation from within the workgroup). This two step process is typically used if the UMS administrator and the workgroup administrator are not the same person (that way both people must agree that the user is allowed to access the workgroup before the user can log in). If you would like to both give a user access rights and add them to the workgroup at the same time, you can do so by clicking on the **Add Users + Access** button instead of the **Add Access** button after you've selected the workgroup(s). Even if you have used the **Add Users + Access** operation, you may still wish to login to each workgroup as Admin and configure the User Groups for the user (by default they will only be made a member of the Users or RestrictedUsers User Group according to their license type).

Character Sets and Workgroup Access

If the user you selected has characters in their user profile information (name, address, etc.) that cannot be displayed in an ISO-8859-1 or Windows-1252

workgroup, then the list of workgroups displayed in the **Available Workgroups** column may not include all workgroups for which the user does not have access rights (and similarly for the **Users without Access** column when you are editing a workgroup's list of users). Any workgroup which cannot display the full user information will not be listed. If you have selected a user with such characters, a note will be displayed at the bottom of the **Available Workgroups** column warning you that not all workgroups may be listed here (and a similar note can be displayed for the **Users without Access** column when you are editing a workgroup's list of users).

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- If a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

For information on checking a workgroup's character set, review the Viewing a Workgroup section. To check a user's character set, use the Viewing a User operation. To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

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Administration Options

This section allows the User Management System Administrator to perform operations such as:

- Updating the password for logging into the User Management System (UMS)
- Setting preferences for the UMS Administrator
- Setting user account options
- Synchronizing user details in a workgroup

Setting the User Management System (UMS) Administrator Password

To **set or change** the UMS Administrator password:

1. Login to **UMS**
2. Click on the **Admin** icon in the top button bar
3. Select the option **Set User Management System (UMS) Administrator Password**
4. Click on the **Continue** button
5. Enter the current password in the **Current Password** field, enter and confirm the new password by typing it into the **New Password** and **Confirm New Password** fields
6. Click **Update** to save the change
7. A confirmation page will be displayed, click **OK** to return to the Administration Options menu

Set UMS Administrator Preferences

To **set preferences** for the UMS Administrator:

1. Login to **UMS**
2. Click on the **Admin** icon in the top button bar
3. Select the option **Set UMS Administrator Preferences**
4. Click on the **Continue** button
5. Set the preferences as desired. A detailed explanation of each preference can be found below.
6. Click **Update** to save the changes

The following preferences can be set for the UMS Administrator:

Maximum User Accounts
Select the number of user accounts to be displayed on each page of the user list on the UMS Home Page or in the User Search results. The default is 10 user accounts per page.

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 within UMS.

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 within UMS. 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 within UMS. For a list of available time zones, please refer to 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, by default this box will be checked. It is recommended that you leave this option enabled.

Export Settings

The following preferences are applied when exporting the user list. 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 has 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 Tracker was 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 you are using on your desktop (the one running the web browser you are using).

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).

Set User Account Options

Each individual workgroup has an Administrator user (called "Admin") configured to maintain the database and operations that pertain to a single workgroup. Other users in a workgroup can be given the Admin privilege in a workgroup so these user can act as a workgroup Administrator. The UMS Administrator can select whether workgroup Administrators are able to add, edit and delete user accounts from the workgroup's User Accounts section.

In addition, the UMS Administrator can set whether the option "User Type" should be enabled for user accounts. The "User Type" option is a user property that has been deprecated and is planned to be removed from a future release. It is possible to use user group privileges to achieve the same effect as the User Type property.

To **set user account options**:

1. Login to UMS
2. Click on the **Admin** icon in the top button bar
3. Select the option **Set User Account Options**
4. Click on the **Continue** button
5. Set the options as desired. A detailed explanation of each option can be found below.
6. Click **Update** to save the changes

Add User Account Options

Allow local workgroup administrators to add new user accounts from their workgroups
Enabling this option allows workgroup Administrators to add new user accounts from the workgroup's User Accounts section. This allows workgroup Administrators to add new user accounts without having to login to UMS. This option is enabled by default.

Edit User Account Options

Do not allow local workgroup administrators to edit user account information in their workgroup
This option does not allow the local workgroup Administrators to edit the user account information for any users in the workgroup's User Accounts section. The user account information can only be modified in UMS or by the user in his / her Account Information section.

Allow local workgroup administrators to edit user account information for users in their workgroup that are not in any other workgroups
This option allows local workgroup Administrators to edit the user account information for any users who are only members of their workgroup (the user is only added to a single workgroup). Any users that match this criteria will have an **Edit** button to the left of the user account listed on the workgroup's User Accounts section. This option is enabled by default for new installations.

Allow local workgroup administrators to edit user account information for all users in their workgroup
When this option is selected, local workgroup Administrators will be able to edit the user account information for any users added to their workgroup. An **Edit** button will be displayed to the left of all user accounts in the workgroup's User Accounts section.

Delete User Account Options

Allow local workgroup Administrators to delete user accounts from the User Management System (UMS) while deleting the users in their workgroup
Enabling this option allows local workgroup Administrators to delete user accounts from UMS at the same time a user is deleted in the workgroup's User Accounts section. This allows workgroup Administrators to delete user accounts without having to login to UMS. This option is enabled by default.

User Type Property

Enable User Type (Internal/External) Property
Checking the box to enable this option allows the User Type property to be set for user accounts. It is recommended that this option only be enabled if you upgraded Tracker from Version 5.5.4 or older. This property for user accounts has been deprecated and is planned to be removed from a future release. It is possible to use user group privileges to achieve the same effect as the User Type property.

Synchronize User Details in a Workgroup

User details may need to be synchronized in a workgroup if for some reason a workgroup's database cannot be updated when a user is edited in the User Management System (UMS) or in another workgroup. For example, let's say a user account is updated using the Edit User operation in UMS, but the database for a workgroup where this user is added is unavailable (e.g. it is a SQL Server database and the SQL Server is stopped). During the Edit User operation, the warning message below will be displayed noting that the user details could not be updated for all workgroups. The Synchronize User Details operation should be used to update the workgroups noted in the warning message.

To **synchronize user details** in a workgroup:

1. Login to UMS
2. Click on the **Admin** icon in the top button bar
3. Select the option **Synchronize User Details in a Workgroup**
4. Click on the **Continue** button
5. Select a workgroup in the **Workgroups** pulldown
6. Click on the **Continue** button
7. A confirmation page will be displayed. Click on the **OK** button to return to the Administration Options menu

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Windows 2003 / 2000 Time Zone Selection Chart

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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

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Knowledge Base and FAQ

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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.

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Contacting NetResults

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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

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. 6.5.0, 6.0.1, 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 6.0 / 7.0 / 8.0, Firefox 2.0 / 3.0, Safari 3.0 / 4.0).
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:
   - All files present in the installation log folder where you installed Tracker. By default, the files can be found in C:\NetResultsLog.
   - 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.
   - 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.
   - 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.