NetResults Tracker Help

Installation Guide Help Topics

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Installation Guide Overview

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The Tracker Installation Guide provides the details necessary to prepare for and install your Tracker software. Information such as system requirements, license information, and recommendations for web server and browser settings are included in this guide.

Additional Help Guides

After installing Tracker, you can begin to configure your workgroups (databases) with the information available in the Workgroup Management System Guide.

The User Management System Guide has information for adding users and giving them access to workgroups.

The Administration Guide is available to help you customize each of your Tracker workgroups (databases).

Lastly, a User's Guide is available as a resource for your Tracker users.

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Installation Guide Glossary

Glossary of Terms

Click on the term to read more about it within the Help section listed to the right.

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

License Manager - The interface where your Tracker license keys are stored.
More information: **Entering License Information**

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

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

Login to a workgroup - The operation used to access a workgroup.
Logging In

Session - A session is started when a user logs into a workgroup. The session ends when a user clicks the Logoff icon or is logged off by an Administrator. A list of user sessions for each workgroup can be viewed in **WMS**, **UMS** or in a workgroup's **User Sessions** page.

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**

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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Installing NetResults Tracker

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Installing NetResults Tracker Software

The NetResults Tracker software only needs to be installed on a supported web server. There is no software to install on the end users' computers or on your (optional) database server(s). To install the software, do the following.

1. Verify that your web server machine meets the System Requirements.
2. Review the Preparation for Installing Tracker information to make sure your web server is ready for installation.
3. Follow the Installation Instructions for this release.

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Entering License Information

If you are starting a trial of Tracker, you can skip this section. A license key does not need to be entered at this time.

Entering License Information

When you purchase a license for Tracker, you will receive a license key (or multiple keys depending on the type of licenses and options you have purchased) that enables the product beyond the trial period. To enter this key, run the Tracker License Manager program that was installed with Tracker. You should be able to run this program from the Start button following this menu:

Start > Programs > NetResults Tracker > License Manager
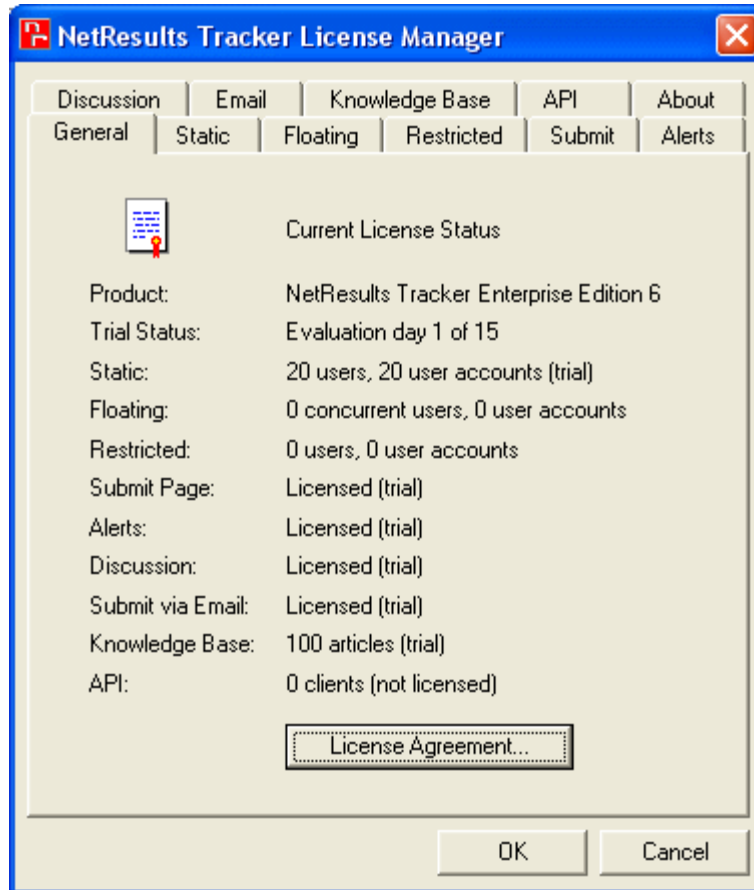
The **General** tab of the License Manager contains the product (Tracker Standard Edition or Tracker Enterprise Edition), your trial status (how many days remain in your trial period), and a summary of the license keys you have entered and features that are enabled. Please review the information below for each of the user and feature licenses that you have purchased.

The **About** tab of the License Manager contains the major version information, copyright, and a link to the License Agreement.

Each key type has its own tab in the License Manager. When entering each license key, be sure to fill out all fields in the section, then click on the **Enter Key** button after entering the information.
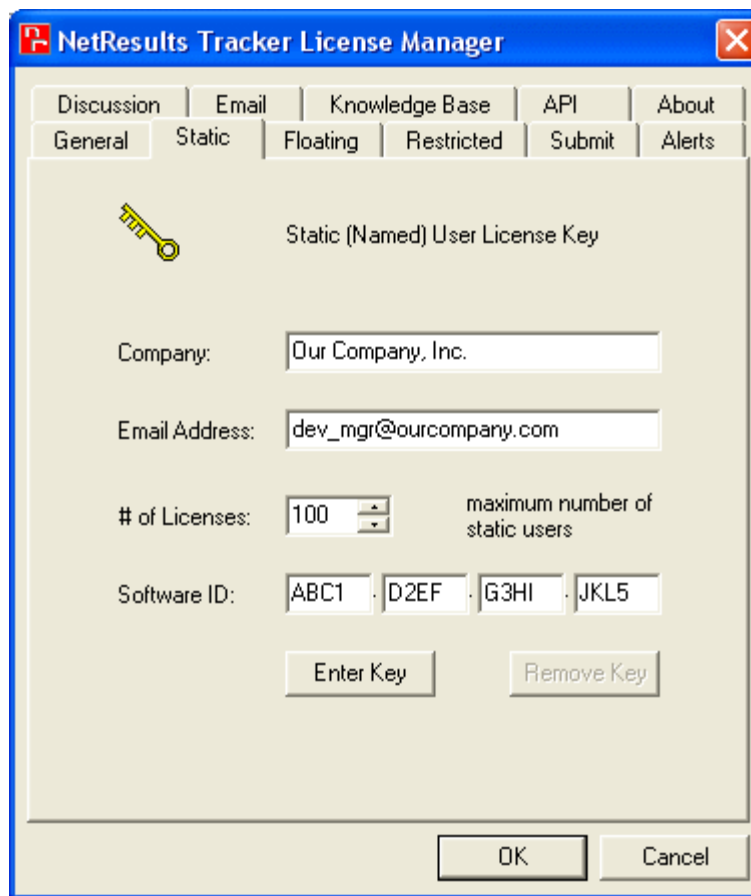
Each software key is matched to a particular email address (also provided when the product is ordered) so it is important that both the email address and key be entered exactly as given in the email containing your license information (case does matter). And, the email address associated with a license key can only be changed when you purchase additional licenses of the same type.

To **remove** a license key, click on the **Remove Key**, then select "Yes" to confirm the operation.

To **replace** a license key, click on the **Remove Key**, then select "Yes" to confirm the operation. Enter the new license key information, then click on the **Enter Key** button.

User License Types

Three special system accounts are built into each Tracker workgroup: Admin, TBD, and Unregistered User (Inet). These three "users" do not count against the user license limits listed below and are automatically included in each workgroup that you create. The Admin user account is included to allow you to configure and maintain a Tracker workgroup. You can log in as this user to customize a workgroup to meet your requirements. The TBD user account is used in the Assignee (owner) field to represent "no one." For instance, it may be used for open issues that have yet to be assigned to someone or closed issues that no longer require any work. The Unregistered User ("Inet") user is used in the Reporter field to represent all users who have reported issues via the Submit via Web for Unregistered Users and Submit via Email features. Neither the Inet nor the TBD User ID can be used to log in to Tracker.

The remaining user accounts in Tracker must have one of the following license types: Static, Floating, or 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 (Named) User Licenses**
  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. See the

User Management System Help Guide for further information on configuration of Static user accounts.

- **Floating (Concurrent) User Licenses**
  Up to ten (10) user accounts (User IDs) may be created for each Floating license. However, only one person per Floating license may be logged in to Tracker at one 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 two to three users to minimize the number of times users can not log in because all Floating licenses are in use.

  If you have purchased only Floating licenses, then after entering your license information (in the "Floating" tab of the License Manager), you should log in to the Workgroup Management System and use the Edit User operation to convert your existing trial accounts, if any, to Floating user accounts (as all trial user accounts are configured as Static user accounts). Until all user accounts are set up as Floating user accounts, your users will not be able to login to Tracker.

  Floating users are also referred to as "Unrestricted" or "Non-restricted" users in various areas of the Help Guides. See the User Management System Help Guide for further information on configuration of Floating user accounts.

- **Restricted User Licenses**
  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, participate in Discussions and run text reports (Saved Queries) on the Home page to view summaries of records they have added. A Restricted user cannot perform any other operations (such as Delete, Query, Metrics, History, etc.); cannot be the Assignee for a record; cannot display Metrics (Saved Charts) on the Home page; cannot view information about alerts or source code files; cannot receive alert notifications; and cannot view or access any records which he or 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.

  See the User Management System Help Guide for further information on configuration of restricted user accounts.

Feature License Types

The following license types are available to support Tracker features:

- **Submit via Web for Unregistered Users**
  Also known as the Submit Page, this feature provides a form that can be used unregistered users to submit records to Tracker. For example, it can be used 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 (Reporter field will be set to Inet), cannot login to Tracker to view the status of the issue they reported, and can not have issues assigned back to them for verification (e.g. to sign off on the resolution of the issue). To login to Tracker to check on status of the issue, the user must at least have a Restricted user account. To be able to have an item assigned back to the person who reports it, the user must have a Floating or Static user account.

  After entering the license key, refer to the Submit Page section for information about enabling this feature.

- **Alerts - Enterprise Edition only**
  The Alerts feature is only available in Tracker Enterprise Edition. It allows an email notification message about a particular record to be sent at a future date and time to any user(s) and/or user group(s). The date & time for the Alert can be set directly (absolute) or relative to another date & time (e.g. 2 days before a due date). Alerts can be used as reminders about records or deadlines within a record. Alerts can also be used as a means of escalation, as Alerts can be triggered by a lack of change in Status in a record (e.g. if no one is assigned to process an issue within a given amount of time an Alert will be sent).

  After entering the license key, please review the Customizing Alerts section for the steps needed to enable this feature.

- **Discussion - Enterprise Edition only**
  The Discussion feature is available only in Tracker Enterprise Edition. It allows users to collaborate on topics related to a particular record in parallel to a record's progress through the workflow. Discussion is similar to a newsgroup or message board, where users can be invited to post their comments and are informed of updates to the discussion via email.

  After entering the license key, please review the [Customizing Discussion](#) section for the steps needed to enable this feature.

- **Submit via Email**
  The Submit via Email feature allows users to submit issues to Tracker by sending an email message. You may wish to use this if Tracker is installed on an internal web server which cannot be browsed to by external users (a web server behind your corporate firewall). Users who are out of the office (outside the firewall) can still submit new issues by sending email to a standard POP3 or IMAP email account on your corporate mail server. Tracker can then read the email by connecting to your corporate mail server and add a new record with the email content (including, optionally, any email attachments).

  After entering the license key, please review the [Submit Via Email](#) section for the steps to enable this feature.

- **Knowledge Base**
  Knowledge Base is a feature that is used to publish articles about known issues, frequently asked questions, tech notes, or other information that can be searched by your end users. It includes the full Tracker workflow engine so that your process of creating, reviewing, and updating Knowledge Base articles can be automated and enforced by Tracker.

  Note: Your Knowledge Base license key will include a maximum number of Knowledge Base articles. This number is the total number of Knowledge Base articles that you are licensed to publish in all Tracker workgroups combined (it is not per workgroup).

  After entering the license key, please review the [Knowledge Base](#) section for the steps to configure this feature.

- **API**
  The Application Programming Interface (API) allows you to add records to Tracker from an external application. For example, you can use this feature to create a gateway between a legacy system and your Tracker installation.

  To use this feature, the NetResults Tracker Software Development Kit (SDK) must be installed on the machine that runs the external application. The external application can be running on the same machine as Tracker or on a remote machine that meets the Tracker SDK installation requirements. Please review the SDK Help documentation available in the Start Menu after installing the NetResults Tracker SDK. This can be reached by going to:

  Start > Programs > NetResults Tracker SDK > Tracker SDK Help

  Note: You must purchase one Tracker API/SDK client license for each (client) application which uses the API to connect (add records) to your Tracker installation.

License Agreement

The Tracker License Agreement can be found in the License Manager by clicking on the **License Agreement...** button at the bottom of the General tab or the About tab. Please review this for the specific terms and conditions of your license(s).

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Creating a Workgroup

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After completing the installation process, the next step is to create a workgroup(s) . If you chose to install the default workgroup during the installation set up program, you can begin using this workgroup immediately. To login to the default workgroup, you can browse to:

http://servername/pteval/ptlogin.asp

where **servername** is the TCP/IP name of the machine where Tracker is installed. Alternatively, you can get to this default workgroup from the machine where Tracker is installed by going to

Start > Programs > NetResults Tracker > Evaluation Workgroup

If you wish to create an alias for this default workgroup, please refer to the [Managing Aliases](#) section of the Workgroup Management System Guide.

To create a new workgroup(s), please refer to the [Adding a Workgroup](#) section of the Workgroup Management System Guide.

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Browser Settings

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Tracker does not require any special plugins or unusual browser configuration. So, by default, almost all browsers are already configured for use with Tracker. However, if support for cookies or JavaScript have been disabled in your browser configuration, then you may need to modify the settings. Information on that is below. If such support has not been disabled, you can skip to the next section.

Brower Settings

Tracker uses browser cookies to maintain its state during a session. And, it uses JavaScript to provide data validation on the client side (which improves overall system performance). In order to use Tracker, you must enable the setting of cookies and use of JavaScript in your browser.

By default, most browsers have cookies enabled. However, you can use the table below to determine where to verify that cookies are enabled on your browser.

Beginning in IE 6, there are multiple levels for enabling cookies. It is recommended that the default option, Medium, is selected.

Browser	Menu
IE 6 or 7	Tools > Internet Options > Security > Privacy (select Medium)
Firefox 1.5	Tools > Options > Privacy > Cookies > Allow sites to set Cookies
Firefox 2.0 or 3.0	Tools > Options > Privacy > Cookies > Accept cookies from sites
Safari 3.0, 3.1, 3.2	Safari > Preferences > Security > Accept Cookies (select Always)

By default, most browsers have JavaScript enabled. However, you can use the table below to determine where to verify that JavaScript is enabled on your browser.

Browser	Menu
IE 6 or 7	Tools > Internet Options > Security > Custom Level > Scripting > Active Scripting
Firefox 1.5, 2.0, 3.0	Tools > Options > Content > Enable JavaScript
Safari 3.0, 3.1, 3.2	Safari > Preferences > Security > Enable JavaScript

If a workgroup is set to use one of the IIS authentication methods, then users must not configure their IE browser to only allow "Anonymous logon". Instead they must configure Tools > Internet Options > Security > Local Intranet > Custom Level > User Authentication > Logon to a value other than "Anonymous logon". By default, IE uses something other than Anonymous logon in all security zones, so it is unlikely that this setting will be incorrect.

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Program URLs

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Overview

Tracker is a web application and is accessed by using a standard web browser. Once installed on a web server by the Tracker Administrator, you can access Tracker by entering the appropriate URL into your browser.

Starting Tracker

Once installed, Tracker can be accessed via the following URL:

http://servername/workgroup/ptlogin.asp

where **servername** is the TCP/IP name of the host where the Tracker server software is installed, and **workgroup** is the name of the Tracker workgroup.

For example, if you installed the default workgroup on a server named MYSERVER, you would use this URL:

http://MYSERVER/pteval/ptlogin.asp

Optionally, you can browse to any Tracker workgroup by omitting the "ptlogin.asp" from the URL above as that is configured as the default page for each workgroup.

This will present the Tracker login screen where you can enter your User ID and Password. If this is your first time using Tracker, please see your Administrator for your User ID and Password or if available below the **Login** button, click on the link **New User? Register Here** to create a new user account. If you are the Administrator and this is your first time using Tracker, please login using Admin as the User ID and Admin as the Password. Then, please change the password for the Admin user account.

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Uninstalling Tracker

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Tracker fully supports Windows uninstall, and can be removed from the web server by using the icon labeled **Repair-Uninstall Tracker** that is located in the Tracker Program folder, or by using the **Add/Remove Programs** icon in the Control panel. This operation must be done while logged in as Administrator (or a user in the Administrators group) on the web server machine on which Tracker is installed. After starting the Setup program from the Tracker Program folder or Add/Remove Programs, click **Next** on the welcome dialog. Then select **Remove** and on the next dialog and click **Next**. You can also select **Repair** on this dialog to reinstall the Tracker files, if you feel some of those files have been accidentally modified or removed.

If you were using the [Alerts](#) feature, after uninstalling Tracker you must manually delete the Scheduled Task created for the Alerts function. To do this,

1. Go to Start > Settings > Control Panel
2. Double click on **Scheduled Tasks**
3. Right click on the Scheduled Task used for Tracker Alerts
4. Select **Delete**

If you were using the [Submit via Email](#) feature, after uninstalling Tracker you must manually delete the Scheduled Task created for the Submit via Email function. To do this,

1. Go to Start > Settings > Control Panel
2. Double click on **Scheduled Tasks**
3. Right click on the Scheduled Task used for Tracker Emails
4. Select **Delete**

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Windows 2003 Time Zone Selection Chart

The following is a list of time zones that are supported by Tracker when installed on a Windows 2003 system.

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

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 1.5 / 2.0 / 3.0, Safari 3.0 / 3.1 / 3.2).
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.