


























-  NetResults Tracker
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Welcome to NetResults Tracker™.

[NetResults Tracker](#) is a powerful, easy-to-use Web-based collaboration tool to help companies keep track of business issues and automatically manage them to resolution. Tracker is licensed for use by over 1000 companies (with 50,000+ users) in over 35 countries around the world. It is used for applications including:

- Bug tracking, defect tracking, issue tracking, and quality assurance (QA)
- Life cycle management in software, hardware, and product development
- Change management and enhancement request management
- Process management
- Self-service customer support
- Help desk

Our customers are from a broad base of industries, including broadcasting, consulting, entertainment, financial, government, hardware, health care, manufacturing, pharmaceutical, retail, software, system integration, telecommunication, and transportation.

Tracker is a fully Web-based system providing:

- Tracking
Tracking reported bugs, defects, business issues, enhancement requests, etc.
- Workflow
Automatic routing and notification to get issues resolved.
- Process enforcement
Managing and enforcing your company's process of resolving issues.
- Status
Up-to-the-minute project information and status, reports, charts, and graphs to team members, project leaders, and managers everywhere to foster better communication and collaboration.
- Communication
Capturing discussions and sharing knowledge.
- Accountability
History and audit trail.

Tracker is very cost-effective. Most installations can recover the investment in a few short months through the increase in productivity, through the better products produced, through improved customer satisfaction, or simply by not forgetting to include the fix of an important bug in the next release.

Tracker is highly customizable and can be tailored for virtually any workflow and environment. It comes with several pre-defined database templates, each designed for a specific product area. Those currently included are:

- Product Development
- Web Site Development
- Knowledge Base (requires purchase of Knowledge Base add-on)
- Help Desk
- Support
- Base
- Change Management

Tracker greatly simplifies the task of setting up and using an issue tracking system. Since you access Tracker using a standard web browser, there is no special client software to install or administer. In addition, users on all platforms have full access to the system without any special platform specific client software.

Tracker also uses industry standard web server, web browser, and database technologies so you aren't tied to a proprietary web server, client (browser), or database.

Tracker is available in two versions: Tracker Standard Edition and Tracker Enterprise Edition. Tracker Enterprise Edition includes

all of the features of Tracker plus some additional features such as [Alerts](#) and [Discussion](#) to provide improved support for enterprise wide use.

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Features

- Completely web based solution - no proprietary client software is required.
- Customizable without any consulting required - the workflows, forms and fields can be changed completely by a Tracker Admin user.
- Customizable look and feel options to integrate application with your web site and branding
- Flexible user group security model allows defining access to both operations (Add, Edit, Delete, etc.), projects and records.
- Individual user log in and session state ensures security.
- Other Security features include integration with Active Directory, ability to restrict access to Tracker pages by IP address and ability to enforce password policies.
- A "Home" page presented after login for each user allows instant access to records each user has submitted, records assigned to them, and all functions required to process records.
- Can add, remove and rename all fields in the record.
- Ad hoc query mechanism allows unlimited combinations of any record field to form queries on the bug database.
- Advanced query mechanism to build intricate queries using comparison and logic operators as well as nested clauses.
- Customizable report layouts can be saved by each user of the system or shared with other members of a user group.
- Queries and Metrics (charts) can be saved by each user of the system or shared with other members of a user group.
- Knowledge Base feature can be set up to allow end users to search for procedures, best known methods, tech notes, etc.
- Options to allow records to be added to Tracker via email or an external form without having to login to the system
- Unlimited number of attachments of any file type can be uploaded for each record.
- Integrated email can be configured to notify on a change of state or assignment; triggered by other actions performed on a record such as delete, edit, or task; to alert users of deadlines or call attention to records that are overdue; and can be set to notify users about new messages posted to discussions about a record.
- Powerful "Task" feature allows users to be presented with only those fields required by the defined workflow when marking their task complete. Tracker automatically advances the state and reassigns the record as defined by the workflow. "Task" allows all members of the team to follow their department's process, without any specific knowledge of the process as a whole.
- Capability to create, maintain and report on multiple projects, forms and workflows in a single workgroup (database)
- Link Fields can be configured to provide references from one record to another
- Capability to create and maintain an unlimited number of workgroups (databases) from a central interface.
- Source code control integration to associate source files with records.
- Multinationalization available to support Unicode character set.
- Record history keeps a audit trail of activities for all incidents.
- Can add/remove/edit users of the system.
- Self registration option enables a large number of users to quickly create new accounts with minimal Admin intervention
- Can add/remove/edit values for all fields that have a set of allowed values. Examples include product, platform, release number, etc.
- Uses industry standard database technology.
- Separate Administrator functions are also accessed via a web interface. No proprietary administrator software is required.
- No extra database software is required.

For Further Information

For further information on NetResults Tracker, please browse to our web site at www.NetResultsTracker.com. There you can find the latest product, ordering, and support information.

Glossary of Terms

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

More information: [Account Information](#)

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

More information: [Adding Records](#)



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

More information: [Adding Records](#)

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

More information: [Viewing Records](#)



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

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

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

More information: [Record Attachments](#)



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

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

Clone - A duplicate of a record created using the [Cloning](#) feature.





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

More information: [Deleting Records](#)

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


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


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

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


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


Field - A part of the form where data is collected. Fields are created by your Tracker Administrator.


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

 Filter - A way to narrow down query results on the Home or Query pages by applying criteria to Date, Floating Point or Integer fields.
More information: [Querying Records](#)

Form - A set of fields that combined make up a particular "record". For example, if you are using Tracker for issue tracking, the fields that are filled out on the Add Page are part of the "form" for submitting issues into Tracker. Your Tracker Administrator may have set up multiple forms (e.g. one form for submitting bugs and a separate form for submitting enhancements. Each form has its own set of fields that are collected when submitting a record).

 Help - Clicking on this icon in the top button bar will display the User Help Guide in a second browser window. Clicking on this link in the Status bar will display the context-sensitive Help section in a second browser window.
More information: [User's Help Guide Table of Contents](#)

 History Page - The page where a query can be run to search for information in the audit trail of the records.
More information: [Record History](#)

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

Key Fields - Important fields configured in a form that can be searched via the Search Window or via Link Fields when trying to identify or locate particular records.
More information: [Viewing Records](#)

Knowledge Base - This separately purchased option allows your end users to search for information to resolve questions and issues without logging into Tracker.
More information: [Knowledge Base](#)

Login to a workgroup - The operation used to access a workgroup.
More information: [Logging In](#)

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



Logoff



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

More information: [Metrics](#)

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

More information: [Querying Records](#)

Option Menu Item - Values in a pulldown field

Parent Pulldown - A pulldown that has one or more child pulldowns associated with it. When an option menu item is selected in the parent pulldown, it limits the option menu items available in the child pulldown to only those values associated with the item selected in the parent pulldown.

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

More information: [Preferences](#)

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



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

More information: [Querying Records](#)

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

Record Visibility - A feature that allows you to select which user groups can access the record you are adding or editing via the Make Visible to These User Groups field if you have the appropriate user group privilege.

More information: [Adding Records](#), [Editing Records](#)

Search Window - When clicking on the [Task](#), [Edit](#), [View](#), [Discuss](#) or [Delete](#) icons in the Button bar, a Search Window is displayed to allow you to enter a specific record number or enter criteria to search for records based on key fields or within a project or form.

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

More information: [Self Registration](#)

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

More information: [Source Code Control](#)

State - Each item in the Status field, a state represents a step in the workflow process.

State Group - Workflow states that share a common characteristic. For example, a state group called "Active" could include all states where a record is actively being processed; the group excludes states such as "Closed" or "On Hold" or "Deferred". You may see state groups listed in the Status field on the Query and Metrics pages for the purpose of simplifying report criteria (e.g. return

all records in "Active" states)

State Manager - A user assigned to a certain state in the workflow for the combination of project and form selected in the record.

Submit via Email - This feature allows users to send an email message as a means of submitting a record to Tracker. See your Tracker Administrator for details.


Submit via Web for Unregistered Users - Also known as the Submit Page, this separately purchased option allows unregistered users to submit records via a web form. See your Tracker Administrator for details.

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

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

Transition - A path used to move records from one state to another in the workflow, transitions are presented as choices when you use the Task operation to process a record.

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

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

More information: [Viewing Records](#)

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

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).

Workgroup Management System (WMS) - The interface for creating and maintaining workgroups. An unlimited number of workgroups can be created in WMS.

To begin using Tracker, you must have a user account. This user account may have been created for you by your Tracker Administrator. The Administrator will provide you with the User ID and password to use when you login to Tracker. If you have a User ID and password, proceed to the next section for a [Tutorial](#) to walk you through the basics. If you don't have a User ID and password, proceed to the Self Registration section below.

Self Registration

If the Self Registration feature has been enabled by your Tracker Administrator, you can create your own user account. To do this, browse to the Login Page by going to:

[http://**servername**/**workgroup**/ptlogin.asp](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 (e.g. pteval) you wish to access. If you are not sure where Tracker was installed on your network, please ask your Tracker Administrator.

If Self Registration is available, you will see New User? Register Here below the Login button. Click on the link Register Here to reach the Self Registration form. An example of the form is displayed below.

The screenshot shows a Microsoft Internet Explorer window with the title bar 'Product Development Tracker (pteval) - Self Registration - Microsoft Internet Explorer'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The main content area displays a form titled 'Self Registration - Enter User Details'. A blue note at the top of the form reads: 'Note: Enter user details and click Register to access the workgroup. User ID, Password, Last Name or First Name, and Email are required fields.' Below the note are several input fields: 'User ID', 'Password', 'Confirm Password', 'Last Name', 'First Name', 'Email', 'Company', 'Phone', 'Fax', 'Address 1', 'Address 2', 'City', 'State / Province', 'Zip / Pincode', 'Country', and 'Comment'. At the bottom of the form are two buttons: 'Register' and 'Cancel'.

Enter the details for your user account:

- User ID
Unique identifier for your user account. May be up to 40 characters long.
- Password
Login password for your account. May be up to 10 characters long.
- Confirm Password
Re-enter the password for your account to confirm what you entered above. May be up to 10 characters long.

- Last Name
Your last name.
- First Name
Your first name.
- Email
Your email address, which is used by Tracker to send you email notification messages.
- Company
Your company name
- Phone
Your phone number
- Fax
Your fax number
- Address 1
The first line of your address
- Address 2
The second line of your address
- City
Your city
- State / Province
Your state or province
- Zip / Pincode
Your zip code or pincode
- Country
Your country
- Comment
Any other information you wish to include in your account profile

After entering the information, click on the Register button to save your new user account. A confirmation will be displayed after the user is successfully added. Click on the OK button to return to the Login Page to login and begin using Tracker.

The goal of this chapter is to walk you through the basic operations using Tracker. This tutorial assumes that the product has been installed, and you are using the default database that was installed. If your Tracker Administrator has customized your installation of Tracker, you may find that there are differences between the procedures described here and what you are working with. In this case, use this tutorial as more of a guideline to using the system.

In this tutorial you will:

- [Start Tracker using your browser](#)
- [Add a record to the database](#)
- [Query for the record](#)
- [Mark the task complete](#)
- [Logoff from the system](#)

Starting Tracker

To use Tracker, start your web browser and go to 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 (e.g. "pteval") you wish to access. If you are not sure where Tracker was installed on your network, please ask your Tracker Administrator.

You are presented with the login screen. Enter your User ID and password to log in. If you are using the sample database, enter the User ID "dev_mgr" and a password of "dev_mgr".

After logging in, the first screen you will see is your Tracker homepage, which is typical of all the Tracker pages. Please spend a moment to become familiar with it:

Button Bar
Status Bar
Dialog Area

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Powered by NetResults Tracker Version 6.6.0

Status Home Page - Ready Help

Welcome Developer One 04/30/2009 11:31:57 AM [UTC-0700] Account Info | Preferences

Tracker will be upgraded to the latest version over the weekend. You will receive an email with a list of new features on Friday.

Assigned To Me [Users] 4 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review	
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	1

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Project Status (Default) [Users] Print | Export

Current Status Totals

- Deferred
- Fixed
- In Development
- In Test
- Released
- Reported
- Scheduled
- Tested

Note the icons in the Button Bar. Depending upon how your Tracker Administrator has set up your account, you may see fewer or perhaps more buttons. Each button allows you access to a basic Tracker operation. If you are using the sample database, you should have access to all but the Administrative functions.

On any Tracker page, there is a context-sensitive Help link in the upper right corner of the Status bar. Click on this link at any time to get detailed information from the Help Guide about the page displayed.

Add A Record

The first thing you will do is report an issue. To do this click on the Add icon located in the button bar. You are presented with a page where you can enter information about the issue you would like to report. In the Product field, select the a product (if you are using the sample database, just select "None"), enter the string "My first record" in the Description field. Select your name for "Assigned To" if that field is available and your name or User ID appears on the list. Click on the Add button to save the new record. The new record is added to the Tracker database. Note that Tracker is now ready to add another record, the Status Bar shows you the record number of the last added record. Make a note of this record number as you will need it later.

Query for Records

Now that we have a record in the database, let's try doing a query to find that record. To do this, click on the Query icon located in the button bar. You are presented with a page where you can define a query. In this case, we want to find all records for the product "None". Click on the Clear button. Then, just select "None" from the Product pulldown, and click on the Run Query button. Note that since all the other fields are using the value "*", any value in these fields will match our query.

The page that appears displays the results of the query. Note that in each row displayed, there are some icon buttons (View, Task and possibly Edit or Discuss). These icons allow you to perform an operation on the record. Click the View icon. The contents of the record you defined are displayed. Click the OK button to return to the query result page. These icons in the button bar also allow you to perform an operation on a record, however, you must enter the record number to do so.

Now try clicking the link labeled Format For Printing. This causes the same query result page to be reformatted to take up less space (the buttons are removed and a smaller font is used). This format is often more convenient for printing reports. Click the link labeled Format For Editing to return to the previous query result page.

Now let's refine the query. Click the OK button on the query result page - you should return to the query page. Click on the Clear button. Enter the string "My first record" in

the Search for field, select "Description" in the in list, select "Exact Phrase" in the using pulldown and click the Run Query button. This time only those records that contain the exact phrase are matched in the result.


Mark A Task Complete 

The Home Page is configured to show records that are assigned to you in the "Assigned to Me [Users]" report. To process a record that is assigned to you, click on the Home icon on the Button Bar and locate the task (record) you wish to complete. If you don't see it on your home page (it only displays 20 records), use the Query icon to locate the desired record. Once you have identified record, click the Task icon (a blue check mark) that is either located on your Home page, on the Query result page, or on the Button Bar (you must enter the record number if you use the Task icon on the Button Bar).

The Task icon presents a form that allows you to enter any information appropriate to the task you have completed, and automatically advances the record state to the next state in the process. It also automatically resets the assignment as defined by your Tracker administrator, indicating that it is ready to be handled by another individual for the next step of the process.


Select a transition and click OK. Depending on the transition you selected, you may be presented with a set of fields to be updated. Enter information or make selections in the fields and then click the OK button. A confirmation page will be displayed and will note to what state the record was moved and to what user the record was assigned. Note that depending upon your original query, the record may or may not appear in the query summary because the state and assignee fields have changed.



Logoff the System 

When you are done using Tracker, you should log off the system. Logging off is a good practice as it prevents other users from mistakenly accessing Tracker from your computer and performing actions under your user account.

To logoff, click on the Logoff icon in the Button Bar.

NetResults Tracker Help 

The Tracker User Interface Help Topics << >>

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Home Query Task Add Edit View Discuss Delete Metrics History Logout Help

Status Home Page - Ready Help

Welcome Developer One 04/30/2009 11:31:57 AM [UTC-0700] [Account Info](#) | [Preferences](#)

Tracker will be upgraded to the latest version over the weekend. You will receive an email with a list of new features on Friday.

Assigned To Me [Users] 4 records [Print](#) | [Export](#) Search... Page 1 of 1

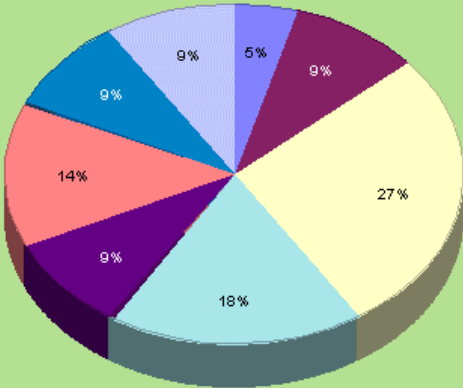
PRN	Action	Product	Title	Reported By	Status	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review	
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	1

Reported By Me [Users] 2 records [Print](#) | [Export](#) Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Project Status (Default) [Users] [Print](#) | [Export](#)

Current Status Totals



Status	Percentage
Deferred	9%
Fixed	5%
In Development	9%
In Test	27%
Released	18%
Reported	14%
Scheduled	9%
Tested	9%

The Tracker user interface has the following main components as shown in the illustration above:

1. Button Bar

This bar contains buttons that allow direct access to Tracker's primary functions. For those operations that require a record, a Search Window appears prompting you to enter a record number. By default this dialog will contain the record number of the last record on which an operation was performed. You can also enter keywords to search for records. This bar also contains the Version of Tracker being used.

2. Status Bar

This area reports the status of the last operation. The Status Bar will remain at the top of the page as you scroll to view the contents of the Dialog Area. If a long message is contained in the Status Bar, click on Status Bar and move the cursor to the right to see the full content of the message. Clicking on the Help link on the right end of the Status Bar provides the help contents for the current page. Depending on the permission given to the login user, the Help link may or may not be available.

3. Dialog Area

This is the primary data entry and reporting area of Tracker. In most cases action buttons that appear in this area are placed at both the top and the bottom of the form to allow easier access.

Tracker helps you to track the progress of a record through a series of steps within your organization. The order in which a record can move between these steps is called the *workflow*.

At each step in the workflow, some work is done by an individual to complete the step, and then the record is advanced to the next step. This process is repeated until all of the steps are completed. For instance, in a typical product development organization, the follow series of steps might take place once an issue is reported...

1. Customer reports an issue
2. Customer Support engineer verifies the issue and creates a record in the defect tracking system.
3. Development Manager assigns the issue to a developer to fix.
4. Developer fixes the issue
5. Quality Assurance Manager assigns the issue to a QA engineer to verify the fix.
6. QA engineer verifies the fix
7. Fix is incorporated in the product

Issues to consider when designing a workflow include identifying the steps in the process, the key individuals in the process, the events that the key individuals should be notified about, the data that is required at each step in the process, and who should handle each step.

Tracker Workflow Customization

Tracker supports full customization of workflow for any number of individual process states. This customization includes state names, transitions, assignments, and email notification.

Tracker Automatic State Advance

To aid in the process of advancing the state of a record in the process flow, Tracker includes the Task feature. This feature allows the currently assigned individual to indicate that he/she has completed the task assigned to him/her and enter the information appropriate to completing the work. Tracker then automatically advances the record to the next appropriate state, and changes the assignment to the next appropriate individual (as defined by the Tracker Administrator).

With the Task feature, it is only necessary for each individual to log into the system, identify the task (record) that they have completed, and use the Task operation. They are prompted for all the information required and the record is sent on to the next individual automatically. All users follow the defined process without needing to know the process as a whole.



Tracker keeps a history of all operations which modify a record. This history allows you to keep an audit trail of which individuals worked on a particular record, when they worked on it, and what type of operation was done to modify the record.

To view the Record History for a particular record:

1. Login to the [workgroup](#)
2. Click on the View icon and enter the number of the record you wish to see.
3. If you are allowed to view the history, it will be displayed at the bottom of the view page under the heading Record History.

Record History

Date	Action	By	Status	Assigned To	Product	Interface	Comment
04/26/2005 01:12:27 PM	ADD	QA One	Reported	Process Manager	Our Browser	WEB	
04/26/2005 01:12:52 PM	ATTACH_ADD	QA One	Reported	Process Manager	Our Browser	WEB	Added Attachment - Screen shot of error
04/26/2005 01:14:14 PM	THREAD_START	QA One	Reported	Process Manager	Our Browser	WEB	Thread Initiated - Applet Discussion
05/10/2005 04:20:41 PM	TASK	Process Manager	Scheduled	Development Manager	Our Browser	WEB	
05/10/2005 04:22:37 PM	TASK	Development Manager	In Development	Developer One	Our Browser	WEB	
06/08/2005 11:11:09 AM	CLONED_AS	Development Manager	In Development	Developer One	Our Browser	WEB	Cloned As 22

You can also run specific queries over the record history to obtain statistics, such as the number of records that underwent a particular state transition within a particular time period. To run a history query, use the History icon located in the Button Bar.

To run a Record History query:

1. Login to the [workgroup](#)
2. Click on the History icon.
3. If you've run a History search during this login session, the search criteria of your last search will be displayed. Or, if you have not run a history search since you've logged into Tracker, the Action Date will be set such that history entries from the last 2 weeks will be returned in the search results. Click on the Clear button (if you wish to remove the Search Criteria and Report Options selections from previous History operations). Then, select the criteria for your search using the [Search Criteria](#) and [Report Options](#) sections which are described below.
4. Click on the Run Query button.
5. The results will be displayed. When the preference [Exclude Time From Reports](#) is enabled, any date information in the history results will not include time information. To view a record which is referenced in the results, click on the record number listed in the PRN (Record Number) column. This will display the View page of the record you selected. Clicking on any underlined column heading will re-sort the results by the field in that column in ascending order. Clicking on the same column heading a second time will re-sort the results by the field in that column in descending order.

Please note:

- o When the preference [Exclude Time From Reports](#) is enabled, the history results will still be sorted using the time information in date fields even though the time information is not displayed.
- o When PRN (Record ID) is selected for one of the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".
- o When a Release Number type field is selected for one of the Sort By fields, the records will be ordered by the actual values of the option menu items in the field (not by the order property set for each option menu item by the Tracker Administrator)

The results of a History query can be printed by clicking on the Print link on the page where the History Query results are displayed. If there are a large number of entries that match your search criteria, it may take longer to generate the results for printing. When the preference [Exclude Time From Reports](#) is enabled, time information will not be included (only the date) when printing the history results.

The results of a History query can be exported to a *.CSV file (comma separated values format) by clicking on the Export link on the page

where the History Query results are displayed. When the preference [Exclude Time From Reports](#) is enabled, time information will not be included (only the date) when exporting the history results.

Search Criteria

Query History Records

Search Criteria

Project

Form

Action Date on or after **and** before

Action

Action By

Interface

Comment

PRN

Status before action **and** after action

Assigned To before action **and** after action

Product before action **and** after action

Report Options

History Columns

- Action Date
- Action
- Action By
- Interface
- Comment
- Status Before
- Status After
- Assigned To Before

Record Columns (Report Layout)

Sort By

<input type="text" value="Action Date"/>	<input type="text" value="Ascending"/>
<input type="text" value="Action"/>	<input type="text" value="Ascending"/>
<input type="text" value="Action By"/>	<input type="text" value="Ascending"/>
<input type="text" value="PRN"/>	<input type="text" value="Ascending"/>

Maximum Records per page

When running a History Query, the following options are available for defining search criteria:

Action Date

The results can be limited to actions performed within a certain date range. Use the "On or After" field with or without the "AND Before" field to specify the date range for the entries you wish to include in the results. Leaving the fields blank will match entries with any action date. By default, the "On or After" field will be configured to return results from the last 2 weeks. For example, if today is January 15, the On or After field will have January 1 entered.

You can either click on the calendar icon to select a date or you can manually enter a date in the appropriate format (e.g. "mm/dd/yyyy HH:MM:SS AM/PM" or the date & time format selected in the [Preferences](#) section.). The time component is optional. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or

Status

Whether a status was changed or unchanged or changed to or from specific values can be included as criteria for a search. Selecting "changed" will return all history entries where the status was changed. Selecting "unchanged" will return all history entries where the status was not changed. Selecting a state or state group for the pulldown "<State> before action" will return all history entries where the state of the record matched the state or state group selected in the pulldown prior to the action recorded by the history entry. State Groups are denoted as [state groups] within the pulldown. For example, selecting "Reported before action and * after action" will return all history entries where the state of the record was Reported before the action and any state after the action recorded by the history entry (e.g. an action where a record was moved from the Reported to Closed will be a match for this criteria). Selecting a state or state group for the pulldown "and <State> after action" will return all history entries where the state of the record matched the state or state group selected in the pulldown after the action recorded by the history entry. For example, selecting "** before action and In Development after action" will return all history entries where the state of the record was any state before the action and In Development after the action recorded by the history entry (e.g. an action where a record was moved from Scheduled to In Development will be a match for this criteria). Select the blank value in the 1st pulldown and * for the 2nd and 3rd pulldowns if you don't wish to limit the results by Status (results will match entries for any state).

Assigned To

Whether the assignee was changed or unchanged or changed to/from specific values can be included as criteria for a search. Selecting "changed" will return all history entries where the assignee was changed. Selecting "unchanged" will return all history entries where the assignee was not changed. Selecting a user for the pulldown "<Assignee> before action" will return all history entries where the assignee of the record matched the user selected in the pulldown prior to the action recorded by the history entry. For example, selecting "QA Manager before action and * after action" will return all history entries where the assignee of the record was QA Manager before the action and any user after the action recorded by the history entry (e.g. an action where a record was assigned to the QA Manager prior to the action and assigned to Build Manager after the action will be a match for this criteria). Selecting a user for the pulldown "and <Assignee> after action" will return all history entries where the assignee of the record matched the user selected in the pulldown after the action recorded by the history entry. For example, selecting "** before action and Process Manager after action" will return all history entries where the assignee of the record was any user before the action and Process Manager after the action recorded by the history entry (e.g. an action where a record was assigned to Development Manager prior to the action and assigned to Process Manager after the action will be a match for this criteria). Select the blank value in the 1st pulldown and * for the 2nd and 3rd pulldowns if you don't wish to limit the results by the Assigned To field (results will match entries for any assignee).

Product

Whether the Product field was changed or unchanged or changed to/from specific values can be included as criteria for a search. Selecting "changed" will return all history entries where the Product field was changed. Selecting "unchanged" will return all history entries where the Product field was not changed. Selecting a product for the pulldown "<Product> before action" will return all history entries where the Product field of the record matched the product selected in the pulldown prior to the action recorded by the history entry. For example, selecting "Product 1 before action and * after action" will return all history entries where the Product field of the record was Product 1 before the action and any product after the action recorded by the history entry (e.g. an action where a record had Product 1 selected prior to the action and Product 2 selected after the action will be a match for this criteria). Selecting a user for the pulldown "and <Product> after action" will return all history entries where the Product field of the record matched the product selected in the pulldown after the action recorded by the history entry. For example, selecting "** before action and Product 3 after action" will return all history entries where the Product field of the record was any product before the action and Product 3 after the action recorded by the history entry (e.g. an action where a record had Product 2 prior to the action and {Product 3 after the action will be a match for this criteria). Select the blank value in the 1st pulldown and * for the 2nd and 3rd pulldowns if you don't wish to limit the results by the Product field (results will match entries for any product).

Report Options

The following options are available to customize the content included in the report results:

History Columns

Select the data items from the Record History that you want to be included in the report results. Each item selected will be displayed as a column in the history report results. To select multiple items, hold down the CTRL button on your keyboard as you click on the history column items. "Status Before", "Assigned To Before" and "Product Before" will display the status, assignee or product of the record prior to the action recorded by the history entry. "Status After", "Assigned To After" and "Product After" will display the status, assignee or product of the record after the action recorded by the history entry. See [Search Criteria](#) section above for a description of the rest of the items in this option. When the preference [Exclude Time From Reports](#) is enabled and a date field is selected as a history column, the time information will not be included (only the date) in the history results.

Record Columns

Select a report layout to display field information from the records which are referenced in the history report results. All report layouts to which you have access will be available in the pulldown. Members of the Admin user group will have access to all group report layouts irrespective of whether they are members of other user groups. Selecting <None> will not display any fields from the records besides those selected in the History Columns option. Note: If you wish to include history entries for permanently deleted records in the History results, this can only be done when <None> is selected for the Record Columns field.

Sort By

Choose up to 4 fields by which the history report results should be sorted. For each field selected, choose whether the sorting should be ascending or descending. The fields that can be selected for sorting are Action Date, Action, Action By, Interface, PRN, Status Before, Status After, Assigned To Before, Assigned To After, Product Before, Product After. Or, select * if you do not wish to select specific fields for sorting.

"Status Before", "Assigned To Before" and "Product Before" will sort the results by the status, assignee or product of the record prior to the action recorded by the history entry. "Status After", "Assigned To After" and "Product After" will sort the results by the status, assignee or product of the record after the action recorded by the history entry. See [Search Criteria](#) section above for a description of the rest of the fields. Please note when the preference [Exclude Time From Reports](#) is enabled, the history results will still be sorted using the time information in date fields even though the time information is not displayed. When PRN (Record ID) is selected for one of the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".

Maximum Records per Page

Set the maximum number of records (any number from 5 to 100) that should be displayed on each page of the history report results.

To use Tracker you must log into the system. Start your web browser and go to 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 of the Tracker workgroup (e.g. "pteval") you wish to access. If you are not sure where Tracker was installed on your network, please ask your Tracker Administrator.

Depending on the configuration set up by your Tracker Administrator when you are using Internet Explorer, you may be prompted with a pop-up window to enter credentials to allow you to access Tracker. Enter the User Name and Password for your Windows user account.

The Login Page may be displayed when you browse to the link for Tracker. If so, enter your User ID and password to log in or, if available, click on the link [New User? Register Here](#). Details on creating your own account by Self Registration can be found in the [User Accounts](#) Help section.

Product Development Tracker

Please enter your ID and password.

User ID

Password

Remember Password

[Forgot your Password?](#)

[New User? Register Here](#)

Powered by [NetResults Tracker](#)

If you have forgotten your password and have previously set up a Security Question and Answer in the [Preferences](#) section, you can reset your password by clicking on the [Forgot Your Password?](#) link on the Tracker Login Page. Details for setting up a Security Question and Answer or resetting a forgotten password can be found in the [Reset Password](#) section of the Preferences

page.

On occasion when logging in, you may encounter the error message, "Login Failed - Your previous login session is still active." This message can come up if you were previously logged in to Tracker, but did not click the Logoff icon to finish your session. Select Yes so that the previous session will be closed and a new session will begin and allow you to login. If you select No, you will not be able to login to Tracker.



If you are using floating licenses, it is important that you click the Logoff icon to end your Tracker session when you are done. Simply exiting your browser will not end your session and may prevent other users from being able to access Tracker. If you do forget to click the Logoff icon, simply login in again, answer Yes when asked to delete your old session, and then click the Logoff icon on the Home page when it is displayed.

If you browse off to another site without clicking the Logoff icon to end your Tracker session, you can click the Back button on your browser several times to return to the last Tracker page you were on and then click the Logoff icon. Or, you can simply browse back to the login page, login again, then click the Logoff icon on the Home page when it is displayed. Tracker does not allow more than one active session per user account (irrespective of license type), so if you login and then logoff you can always be certain that you have not left any active sessions around.

If your user account is of the floating license type, you may encounter the error message, "Login Failed - The maximum number of concurrent logins has been reached. Please try again later or contact your administrator." This message is generated because the maximum number of floating license users are already logged into the system. As soon as another floating license user logs off (or is forced off by your administrator), you will be able to login to Tracker.

If it is important that you are always able to login, please ask your administrator to configure you as a static license user. Static license users have a single license permanently assigned to them.

After logging in, the first screen you will see is your Tracker Home Page. By default, this page has two reports, which display the records assigned to you and the records reported by you. Also present on the Home Page is a link to the personal preferences section, where you can customize various user settings, such as changing your password and selecting date and report settings. A link to edit your account information may also be displayed depending on the privileges granted to you by your system administrator.

Button Bar
Status Bar
Dialog Area

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Powered by
NetResults Tracker
 Version 6.6.0

Status: Home Page - Ready Help

Welcome Developer One 04/30/2009 11:31:57 AM [UTC-0700] [Account Info](#) | [Preferences](#)

Tracker will be upgraded to the latest version over the weekend. You will receive an email with a list of new features on Friday.

Assigned To Me [Users] 4 records [Print](#) | [Export](#) Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review	
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	1

Reported By Me [Users] 2 records [Print](#) | [Export](#) Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Project Status (Default) [Users] [Print](#) | [Export](#)

Current Status Totals

- Deferred
- Fixed
- In Development
- In Test
- Released
- Reported
- Scheduled
- Tested

Report Layout

You can customize the columns of the reports displayed on your home page either by creating your own saved report layout or selecting an existing saved report layout. Please refer to the section [Using Saved Queries & Reports](#) for details.

Report Query

You can customize the query "Assigned To Me" with a query of your choice by defining your own personal saved or advanced query and selecting it for the First Home Page Report field in the Personal Preferences page. Alternatively, you can select an existing saved or advanced query for this first home page report as well. You can customize the query "Reported By Me" using the Second Home Page Report field in the Personal Preferences page. Information on selecting the queries for the Home Page reports via the Personal Preferences page is described in the section below. Please refer to the section [Using Saved Queries & Reports](#) for details on how to create your own saved query or refer to the section [Advanced Queries](#) for information on creating advanced queries.

Dynamic Report Selection

You can view different saved queries or charts on the Home page at any time by clicking on the pulldown menu above each report. Any saved query or chart to which you have access will be displayed in the pulldown for selection. To permanently change the reports displayed on the Home Page when you first log into Tracker, you will need to select the desired reports in the [Preferences](#) section.

Dynamic Report Searching

You can perform a text search within the query results on a Home Page report. For example, you may wish to find all the records in the query results that have "database" in the Title field as shown in the sample below.

Powered by NetResults Tracker Version 6.6.0

Status: Home Page - Ready

Welcome Developer One 04/30/2009 11:31:57 AM [UTC-0700] Account Info | Preferences

Tracker will be upgraded to the latest version over the weekend. You will receive an email with a list of new features on Friday.

Assigned To Me [Users] 4 records Print | Export database Page 1 of 1

PRN	Action	Product	Search In: Title	Using: Any Word	Reported By	Status	Priority
DEV21		Our Database	Display new		QA Manager	In Development	2
DEV11		Our Spreadsheet	Tab travers		Process Manager	In Development	3
KB6		Our Database	Managing A		Support Engineer One	In Dev Review	
DEV5		Our Spreadsheet	Add new spreadsheet wizard		Developer Two	In Development	1

To search within the query results:

1. Enter a key word(s) or phrase into the Search... text box at the top of the report
2. If desired, click on the dropdown icon to select in which fields you wish to search. Selecting "<All>" will search the available fields for the key word(s) or phrase entered (this is the default selection). Or, choose specific fields to be searched. You can select multiple fields by holding down the Ctrl button on your keyboard as you make your selections. Date and Link type fields are not available for selection. If you wish to find a subset of the query results based on a Date field, you can use the [range filtering option](#).

When searching for a specific PRN, you must enter the full PRN including the short name, if applicable. For example, if you are trying to find the ticket SUP20, entering only "20" will not return this record. You must enter "SUP20" into the Search text box.

When choosing a Release Number field to search within, the value you enter into the Search text box will be searched within each individual digit of the Release Number field. For example, you can search using values like "1", "Beta 2", etc. Basically, you can search for the items that are configured as choices in the Release Number field. However, you cannot search for a combination of multiple digits at once. For example, if you enter "1.2" into the Search text box in an attempt to find records that have values like "1.2.0.None", "1.2.0.Beta 1", "1.2.1.-", you will get 0 matches because it will search for the value "1.2" within each individual digit of the Release Number.

You can choose one of the available search methods: "Any Word" (default selection), "All Words", "Exact Phrase", "Boolean Expression". An explanation of each of these methods is available in the [Full Text Search](#) section of the Query Page.

3. Click on the Search icon to run the search. Any matches will be displayed.

You can click on the remove icon to remove the search criteria and reset to the defaults (no key word(s) or phrase in Search text box, "<All>" selected, Search method is "Any Word"). This will display the original set of query results.

If you choose to run another search while a subset of the query results is displayed, the new search will be done against the entire set of original query results. For example, if a query returns 12 matches and you run a text search that returns 5 matches. If you run another search while those 5 matches are displayed, the new search will search against the original 12 matches (not only within the 5 that matched your last search).

If you have applied any [filters](#), the excluded items will not be included in the results of any searches done within the query results.

Dynamic Report Range Filtering

Range Filters can be applied to show a subset of the query results. Range Filters are available for Date, Floating Point and Integer type fields. For example, you may wish to see records that fall into a certain date range. Or, you may wish to see records that have a value greater than or less than a certain value in Floating Point or Integer fields. In the sample below, a filter is being applied to show only those records with "Date Reported" within the previous week.

Powered by NetResults Tracker Version 6.6.0

Status: Home Page - Ready

Welcome Developer One 04/30/2009 11:52:30 AM [UTC-0700] Account Info | Preferences

Tracker will be upgraded

Assigned To Me [Us

PRN Action

DEV21

DEV11

KB6

DEV5

Filter Results by 'Date Reported' Close

Date Reported

on or after and before



within the previous hours

Apply Filter Cancel

Page 1 of 1


Reported	Priority
7 04:00:41 PM	2
7 03:51:27 PM	3
7 04:23:41 PM	
7 03:45:21 PM	1

To apply a filter:

1. Click on the  empty filter icon next to the field name in the column heading
2. For Date fields, you can specify a date or a date range in the "on or after" and "and before" fields. A date can be typed in or you can click on the  calendar icon to select a specific date. Or, you can select a date relative to the current date and time using the "within the" option.

For Floating point and Integer fields, you can select one of the conditions (<, <=, >, >= and =) and enter a value. You can also specify a range by selecting another condition and entering a value in the "and" option.
3. Click on the Apply Filter button. The query results will be refreshed to display the items that matched the filter conditions.

To remove a filter:

1. Click on the  full filter icon next to the field name in the column heading
2. Click on the Remove Filter button. The query results will be refreshed to reflect the removal of the filter.

Dynamic Sorting of the Results

The initial sort order of reports on the Home Page is based on the selections made in the Sort By options in the saved query. You can change the way the reports on the Home page are sorted at any time by clicking on the field name. The field that is being used as the primary sort field will have an arrow to the right of the field name. If the arrow is pointing down, the results are sorted by that field in a descending order. If the arrow is pointing up, the results are sorted by that field in an ascending order. Clicking once on the field with the arrow will reverse the sort order. Clicking once on any field that does not have the arrow will sort the results in ascending order by that field. Any field except TextArea type fields can be clicked to sort the results by that field. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is selected in the Sort By section of the saved query, the report results will be sorted by the time in each record even though the report will not display the time information. When PRN (Record ID) is selected for one of the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".

Other Features of the Home Page

When the Assigned To or Reported By fields are displayed as columns on a Home Page report, the user's name will appear as a clickable link if you have the appropriate privilege. Click on the user's name to display the user's profile information as shown below.



Full Name	Developer One
Company	Our Company
Email	dev_one@email.com
Phone	650-555-1212
Fax	650-555-1214
Address	1234 Technology Drive
City	Our Town
State / Province	CA
Zip / Pincode	94348
Country	USA
Comment	

Close

There is one Export link for each report displayed on the Home Page. The records displayed in each of the Home Page reports can be exported to a CSV file (comma separated values format) by clicking on the Export link to the right of the Report Pulldown at the top of the report. You can then open this file with another tool such as Microsoft Excel or Crystal Reports. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is displayed in the report layout, the time information will not be included (only the date) when exporting the Home Page reports.

If you have exported Metric (chart) data, you can create a chart in Microsoft Excel from the exported data by doing the following. Open the file in Excel and "rubber band" (left-click mouse and drag a rectangle around) the data plus column and row titles (exclude rows 1 through 3, but include the individual row/column titles in row 4 and column A along with the data in your selection) and click the Chart Wizard icon (or select Insert->Chart...). Click the Finish button in the Chart Wizard to accept the Microsoft Excel default settings for the chart; or make selections, click Next button, then click Finish to create a chart with custom settings. Please review the Microsoft Excel Help for further information on Excel charts.

To print the results of a report or chart displayed on the Home Page, click on the Print link to the right of the Report Pulldown at the top of each Home Page Report. When a report is displayed on the Home Page, clicking on the Print link will print all of the records that match the Saved Query (including those records not shown on the Home Page when the number of records in the query results exceeds the maximum number of records displayed per page). Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is displayed in the report layout, the time information will not be included (only the date) when printing the Home Page reports.

User Privileges

When you log in, you are given access to data and operations as assigned by your Tracker administrator. These rights are assigned to you via User Groups. Each group defines a set of privileges, and you are assigned to groups. The total set of privileges you have is the sum of all of the rights for all of the User Groups in which you are a member.

Please contact your Tracker administrator if you wish to receive additional privileges.

If you have been granted access to edit your own user account information, a link labeled Account Info will be present in the upper right corner of the Home Page. Click on this link to edit your user account information.

The Edit User Account page allows you to update the contact information stored in Tracker including your email address, phone number, address, etc.

To update your account information, enter information in the fields displayed, then click OK to save your changes.

The contact information that you can update in the Edit User Account page includes:

New Password

To change your password, enter the password you wish to use in this field. This field may not be present depending on the authentication set up by your Tracker Administrator.

Confirm New Password

Re-enter the password you typed into the New Password field above. You must enter the same password into both of these fields in order to successfully change your password. This field may not be present depending on the authentication set up by your Tracker Administrator.

Company

The name of the company or organization you represent

Email

Your email address. This address will be used to send you email notification, [alerts](#), or [discussion](#) messages about records in Tracker.

Phone

Your phone number

Fax

Your fax number

Address 1

The first line of your address

Address 2

The second line of your address

City

Your city

State / Province

Your state

Zip / Pincode

Your zip code or pincode

Country

Your country

Comment

Any comment you wish to include in your user account information

Edit User Account

OK

Cancel

User ID **dev_one**

New Password

Confirm New Password

Last Name

First Name

Company

Email

Phone

Fax

Address 1

Address 2

City

State / Province

Zip / Pincode

Country

Comment

OK

Cancel

NetResults Tracker Help		nr
Preferences	Help Topics	<< >>

From the Tracker home page, click on the link labeled Preferences in the upper right corner.

Personal Preferences for Developer One

OK Cancel

User Password Settings

New Password

New Password Confirm

Report Settings

Maximum Records per page

First Home Page Report ▼

Second Home Page Report ▼

Third Home Page Report ▼

Chart Width x Height x

Display Report User Groups in Home Page

Help Settings

Display Field Help

Date Settings

Date Format ▼

Time Format ▼

Time Zone ▼

Adjust to Daylight Saving Time (DST)

Exclude Time From Reports

First Day of the Week ▼

Business Days Su Mo Tu We Th Fr Sa

You can customize the following features:

User Password Settings

- **New Password**
To change your password, enter the password you wish to use in this field. This field may not be present depending on the authentication set up by your Tracker Administrator.
- **New Password Confirm**
Re-enter the password you typed into the New Password field above. You must enter the same password into both of these fields in order to successfully change your password. This field may not be present depending on the authentication set up by your Tracker Administrator.


Report Settings

- **Maximum Records**
You can select the maximum number of records that are displayed per page for reports on the Home and Query Pages. The upper

limit for this maximum value is 100 records.

- **First Home Page Report**
You can select a saved query, advanced query, or saved chart to be displayed as the first report on your home page. If you do not want a first report displayed on your home page, select the option <No Report> for this field. If this option is selected for all 3 Home Page reports, the following message will be displayed on the Home Page: "No Home Page Reports are configured. If you would like a report to appear here, click the Preferences link above, select one or more Home Page Reports, and click OK."
- **Second Home Page Report**
You can select a saved query, advanced query, or saved chart to be displayed as the second report on your home page. If you do not want a second report displayed on your home page, select the option "No Report" for this field.
- **Third Home Page Report**
You can select a saved query, advanced query, or saved chart to be displayed as the third report on your home page. If you do not want a third report displayed on your home page, select the option "No Report" for this field.
- **Chart Width x Height**
Enter the dimensions that should be used when a saved chart is selected for one of the Home Page reports. The setting that works best in most environments is 700 x 300. This preference is not available for Restricted Users.
- **Display Report User Groups in Home Page**
Checking the box for this option will display the user name in brackets after the report name for group saved reports in the pulldown for each Home Page report. For example, the "Assigned to Me" report will be displayed as "Assigned to Me [Users]" in the pulldown for each Home Page report when this option is enabled.

Help Settings

- **Display Field Help**
Check the box to display the Field Help. Depending on what is configured by your Tracker Administrator, the field help can appear as small text above the field, below the field, or as a yellow question mark icon  next to the name of the fields on the Add, Task, and Edit pages. When the Field Help icon is displayed, you can move your cursor over this icon to get an explanation about the field.

Date Settings

- **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 Tracker.
- **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 Tracker. Choosing 12 hour for the time format will display times followed by AM or PM to denote the appropriate 12 hour period, such as 02:05:38 PM. Choosing 24 hour as the time format will display times without the AM or PM designation, such as 14:05:38.
- **Time Zone**
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 Tracker. For a list of available time zones, please refer to the following section:
[Windows Time Zones](#)
- **Adjust To Daylight Saving Time (DST)**
Check this box if you wish to have Tracker adjust time information to account for daylight saving time. If you selected a time zone in which daylight saving time is observed, we recommend that you enable this option.
- **Exclude Time From Reports**
Check this box if you wish to have Tracker display date information in the reports on the History, Home and Query pages without the time information included. Enabling this preference will also exclude the time information from History, Home and Query reports when they are exported or printed. Enabling this preference does not change how report results are sorted when a date field is selected as one of the "Sort By" fields. When a date field is selected as one of the Sort By fields, the time information is still used for sorting the results even though the time information is not displayed in the report results.
- **First Day of the Week**
Select the day of the week that you want to be displayed in the first column when using the calendar feature for date fields.
- **Business Days**
Check the boxes to the left of the days of the week that should be considered business days when using the calendar feature for date fields.

Export Settings

The following preferences are used when report data is exported from the Tracker Home, Query, and Metrics pages. Data is exported as a CSV (comma separated values) file. However, because there is no firm definition of a CSV standard, you may need to modify some export parameters to allow use of the exported data by other applications (spreadsheet, database, etc.). Tracker and your Tracker Administrator have set these values to defaults that should work in most environments. So in most cases, you should not need to change these settings. If you have an application that is not importing the data correctly, review the information below. If that does not help, please contact your Tracker Administrator.

- **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 your Tracker Administrator configured your system 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).

Note: When exporting data from a UTF-8 workgroup using the recommended settings listed above, misalignment of the data can occur when viewing the exported data in Excel if the file is not first saved to disk and then opened in one of the two ways listed below. Unfortunately, the default file open in Excel does not properly store multiple line text (as there may be in Tracker TextArea fields) in a single cell. Instead, it puts each line in its own cell which results in misalignment of the fields in the spreadsheet.

For UTF-8 data exported with Field Separator set to Tab, Row Separator set to Carriage Return & Line Feed, and File Extension set to txt, you can get Excel to properly place multiple line data in a single cell using one of the two operations below.

1. From Windows Explorer, select the file to be opened.
2. Right-click on the file and select Open With -> Microsoft Excel.

OR

1. From Excel, select File -> Open.
2. Locate and select the file that you want from the list (the file you created when you exported the data from Tracker).
3. Hold down the SHIFT key on your keyboard, and then click the Open button (if you do not hold down the SHIFT key, the file may not be processed correctly).

Query Page Pulldown Settings

- **Enforce Dependencies**
Check the box for this option if you wish to have dependent relationships between pulldown fields enforced when using Query operations. This option cannot be enabled if you have the option Include Obsolete Items enabled. This preference is not available for Restricted Users.
- **Include Obsolete Items**
Check the box for this option if you wish to have obsolete option menu items available in the pulldown fields to be selected as search criteria on the Query Page. Obsolete option menu items are values in a pulldown that have been deactivated, but remain in the workgroup for archive purposes. Existing records may contain obsolete values. You must check the box for this option if you wish to include obsolete values in the search criteria for reports. This option cannot be enabled if you have the option Enforce Dependencies enabled. This preference is not available for Restricted Users.

Multi-Line Field Settings

- **Display Window**
Select the number of lines that should be displayed when editing (Edit or Task operation) or viewing (View operation) the text in a large text field. By default, this will be set to 5 lines. If the contents of a large field extend beyond the number of lines set in this preference, you will have the ability to scroll to see the complete contents of the field. On the View page if you are using Internet Explorer or Firefox as your browser, you will have the option to dynamically expand the window to see the complete contents without scrolling by clicking on the "+" icon to the left of the text. The "-" icon can be used to collapse the field to its default size. On the View page, empty (blank) fields are always displayed as a single line.
- **Fully Expand on View Page**
Checking the box for this option will automatically expand the window for all TextArea fields on the View Page so that all contents of the field will be visible without having to click on "+" icon. The window will be fully expanded irrespective of the setting for the Display Window option.

Visual SourceSafe Login Settings

- SourceSafe Login Settings
Enter your Microsoft Visual Source Safe User ID and password to be able to use the Source Code Control Interface within Tracker. This preference is not available for Restricted Users.

Discussion Settings

Note: These options will not be displayed unless you are using Tracker Enterprise Edition.

- New Post Notification
This option determines when a user will be notified about discussions via email. Selecting "No Email" indicates that a user should not receive any email notification messages related to discussions. Selecting "Receive Email for each New Post" indicates that a user will receive one email notification for each new post in any discussion thread to which he/she is subscribed. Selecting "Receive Email for the first New Post to each Thread" indicates that the user will only receive email for the first post made to each discussion thread since the user last viewed the message list for the thread. With this setting the user can tell which threads have had postings since the last time they were read, but will not have a separate email for each posting (just one per thread with new posts). After viewing the message list for a thread, a notification email will be sent the next time a message is posted.
- Invitation Notification by Email
This option determines whether a user should receive an email notification message when he / she has been invited to participate in a discussion thread initiated for a particular record. Selecting "Yes" indicates that the user should receive an email invitation for each new discussion thread.
- Message Display Window
Enter the number of lines of text you wish to see when displaying a message within a discussion. The default setting is 5 lines of text.

Login Options

This option may not be available depending on the authentication option selected by your Tracker Administrator.

- Auto Login
If your password is currently remembered by your browser, you can enable Auto Login. This feature automatically logs you in, bypassing the log in screen and taking you directly to your home page. To enable this feature, check the box labeled Auto Login. The Remember Password feature below must also be enabled in order to use the Auto Login feature. This option may not be available depending on the authentication option selected by your Tracker Administrator.
- Remember Password
You can set whether your browser should remember your password by checking the box labeled Remember Password and entering the password in the box provided. When enabled, the password field is automatically filled in when you log in. This option may not be available depending on the authentication option selected by your Tracker Administrator.

Reset Password

These options will only be displayed if your Tracker Administrator has enabled this feature in the Login Options section. Set up a Security Question and Answer using the options below so you can reset your password in case it has been forgotten.

- Security Question
Enter a question that will be used to allow you to reset your password in case you forget it. Examples of Security Questions are:
What is your mother's maiden name?
What is your favorite sports team?
What is your pet's name?
- Answer
Enter the answer to the question you entered in the Security Question field above.

If you forget your password:

1. Browse to the Tracker [Login Page](#)
2. Click on the Forgot Your Password? link
3. Enter your User ID and click Continue
4. Answer the Security Question and click Continue
5. Enter and confirm a new password, then click on the Reset Password button
6. Click OK after the password has been reset
7. Login using the new password

Note: You need to have set up a Security Question and Answer prior to attempting to reset your password using the link on the Login Page.

To add a record, click on the Add icon located in the Button Bar. The Add form will appear in the Dialog Area, allowing you to enter information about the issue you are reporting. A sample Add Page is displayed below.

Add Record [Go To Last Query Results](#)

Note: Please do not use this form for customer requests. Use the **Support** form instead. Fields marked with *, **Bold** and **Color** are required.

Title * A brief summary of the issue being reported

Product * The product related to the issue being reported

Platform The platform related to the issue being reported
 None

Severity **Custom Work?**

Description Detailed information about the issue being reported, including the nature of the problem and the steps needed to reproduce the behavior

Status The current state of the issue **Assigned To** The user currently responsible for the issue

Support Tickets Support tickets related to this issue

Options

Add Attachment(s)

Start Discussion

Tracker allows your administrator to customize the fields that appear on the Add Page. Certain fields may be required (you have to enter information or select something other than the default value) when adding an issue. Depending on how your Tracker has configured the system, there may be some text at the top of the Add Page to explain which fields are required. For example, the following text or something similar can be displayed to identify required fields: "Fields marked with *, **Bold** and **Color** are required fields."

The field help will be displayed if you have checked the box for the Enable Field Help [preference](#) and your Tracker Administrator has entered information to describe this field. If a Field Help icon is displayed, move your cursor over the icon to see a description of the field.

Depending on how your Tracker Administrator has configured the system, fields called Project and Form may be displayed on the Add Page. If you have access to more than one project, make a selection in the Project field to reflect which project is related to the record you are adding. If you have access to more than one form, make a selection in the Form field to reflect the kind of record you are adding. The fields displayed on the Add Page may change depending on the form you have selected.

When a pulldown field is present on the Add page, it may be displayed as a traditional pulldown, radio buttons, vertical radio buttons or a search pulldown. In the [sample](#), the Product field is displayed as a search pulldown. When a field is displayed as a search pulldown, you can enter key

Home Query Task Add Edit View Delete Metrics History Logoff Help

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Status Add New Record Help

Add Record

[Go To Last Query Results](#)

Add Add & Copy

Note: Please do not use this form for customer request. Use the *Support* form instead.
Fields marked with * and Color are required.

Project Product Development

Form Issue

Title * database transaction redundancy

Product * Our Database Set

Platform
 MAC OS X
 Windows 2003
 Windows Vista

Reported In Version 2 . 2 . 2 . Beta 1

Request Type Bug Severity 3 (High Impact - Low %)

Description Database transactions looping repeatedly

Workaround

Related Development Tickets

Status Reported

Substatus None

Assigned To Process Manager

Options Add Attachment(s)

Add Add & Set Cancel

database
2 items found
DEV21 (Display new field without requiring database reload)
DEV23 (Reload from database to slow)

As an example of a typical record, the Product Development template (a sample database) included with Tracker has the following fields:

- Title
A brief description of the problem
- Product
The product for which the problem is being reported. The values of this pulldown menu can be customized.

- Platform
The platform for which the problem is being reported. This is often used to indicate a hardware or software platform, such as Microsoft Windows 2000 or Microsoft Windows XP. The values of this pulldown menu can be customized.
- Reported In Version
Used to indicate the version number of the software where the problem was found.
- Request Type
This is the nature of the request, generally either a bug, an enhancement, or a contractual obligation. The values of this pulldown menu can be customized.
- Severity
Severity is a general indicator of how serious the problem is. The values of this pulldown menu can be customized.
- Description
A description of the problem.
- Workaround
A description of how a customer can work around this reported problem.
- Status
The current status of the record. Initially this status is set to TBD.
- Substatus
An indicator of how much progress has been made on the record in the current status
- Assigned To
Name of the individual to whom this record is currently assigned for resolution. This value is chosen from a list of Tracker users.

The Difference between the Add Operation and the Add & Copy Operation

Depending on the configuration set by your Tracker Administrator, you may or may not see the "Add & Copy" button.

After entering the information for a new record on the Add page, you have the option to click "Add" or "Add & Copy" to save the new record. Clicking on the Add button will save the new record, then will return to a "blank" Add form so another new record can be added.

Clicking on the Add & Copy button will save the new record, but when returning to the Add form, the contents of some fields will be saved so that another similar record can be added without having to re-enter information into the fields. The fields which are copied to the Add form for the next record are selected by your Tracker Administrator.

Email Notifications

After clicking on the Add button or the Add & Copy button, if your Tracker workgroup is set up to send email notification messages when records are added, you will see a message "Sending Email Notifications...Please wait". This message indicates that the new record has been added to the system and Tracker is sending the email notification messages.

Relationship between the Product, Status, and Assigned To fields

When the Status and / or Assigned To fields are present on the Add page, the values of these fields are automatically selected based on what you have selected for the Product field (when the Product field is also displayed on the Add page). Even though the Status and / or Assigned To fields are set dynamically based on the selection made for the Product field, you can still choose other available values for these fields.

The option "State Manager" may be present in the Assigned To field. This indicates that the record you are adding will be assigned to a user based on what values you have selected in the Product and Status fields. Your Tracker Administrator configures these State Managers when setting up the workflow.

Dependent Pulldowns

In some cases, your Tracker Administrator may have set up dependent pulldowns. Dependent pulldowns allow the value selected for one pulldown (the parent pulldown) to determine the values displayed in another pulldown (the child pulldown). When dependent pulldowns appear on the Add page, the menu option selected in the parent pulldown will limit the menu options available in the child pulldown.

Specifying Record Visibility

If record visibility has been enabled, and you are a member of a user group that is allowed to modify the visibility of a record to user groups, a selection list called Make Visible to These User Groups will appear at the bottom of the page. This list allows you to select which user groups can see this record in the various pages like View, Edit, and Query. To select more than one user group, hold down the shift or control key while clicking.

Multiple Projects and Forms

If your Tracker Administrator has given you access to more than one project and/or form, the fields displayed on the Add Page may change depending on the combination of Project and Form you select. If you do not see the Project or Form fields on the Add Page, this indicates that you only have access to a single project and/or form.

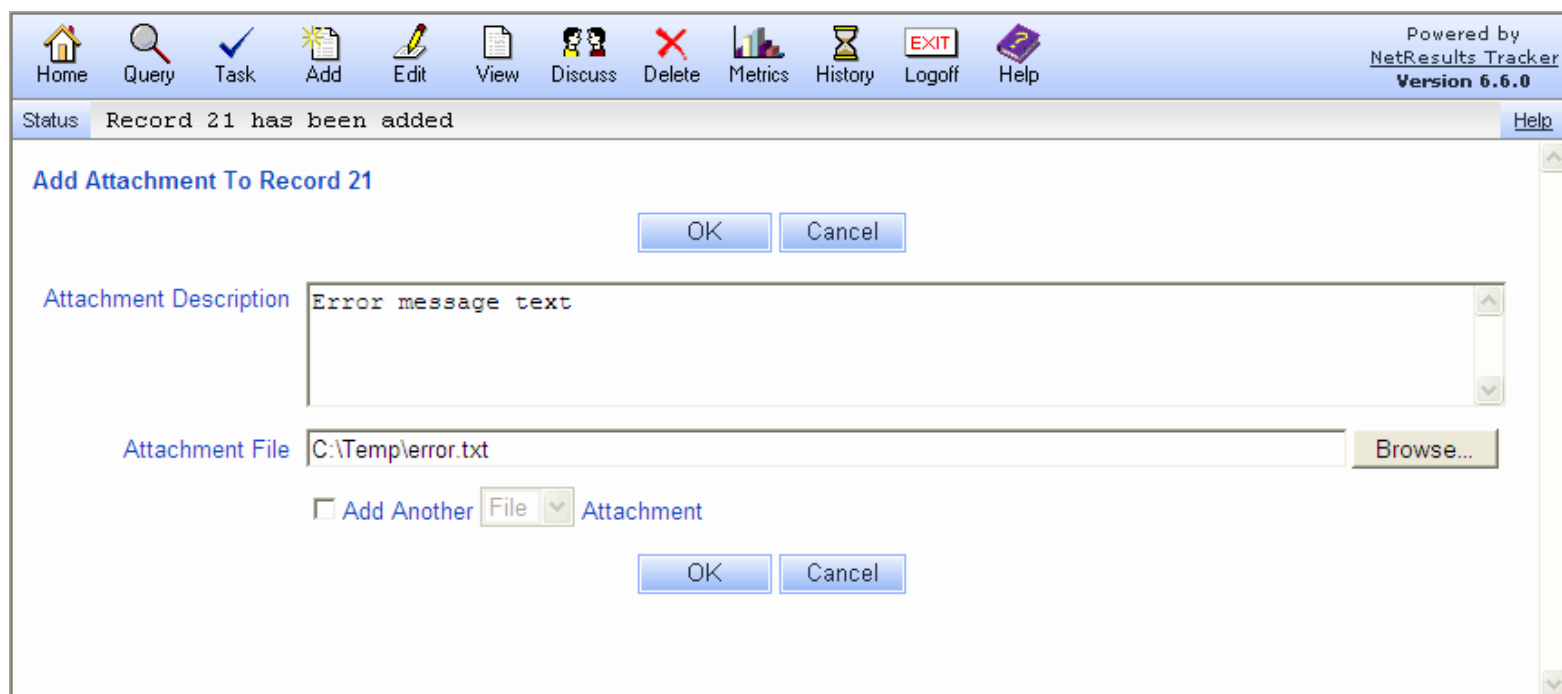
When you have access to more than one project and/or form, the Add Page will automatically display the combination of Project and Form you last used to add a record. For example, if you have access to projects A and B and forms 1 and 2 and you last selected Project A and Form 1 to submit a record, the next time you click on the Add icon, Project A and Form 1 will be selected by default.

Additional Options on the Add Page

Depending on the privileges you have been assigned, you may see additional options at the bottom of the Add page such as "Add Attachment", "Set Alert", and "Start Discussion", some of which are shown in the [Add Page sample](#). These options are discussed in detail below.

Adding an Attachment

 If you are a member of a User Group that has Add Attachment privileges, then you may add a file or URL attachment along with the record.



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Status Record 21 has been added Help

Add Attachment To Record 21

OK Cancel

Attachment Description Error message text

Attachment File C:\Temp\error.txt Browse...

Add Another File Attachment

OK Cancel

To add a file or URL attachment along with the record, please follow the steps below.


1. Check the Add Attachment box at the bottom of the Add page
2. If you've been given the privilege to add either types of attachments, select File or URL from the pulldown.
3. Click on the Add or Add & Copy button to add the new record
4. Enter a meaningful description for the Attachment (this will be displayed when someone subsequently views the record) in the Attachment Description field.
5. For file attachments, click the Browse button (to the right) to select the file from your local machine.

For URL attachments, enter the fully qualified URL into the field provided.

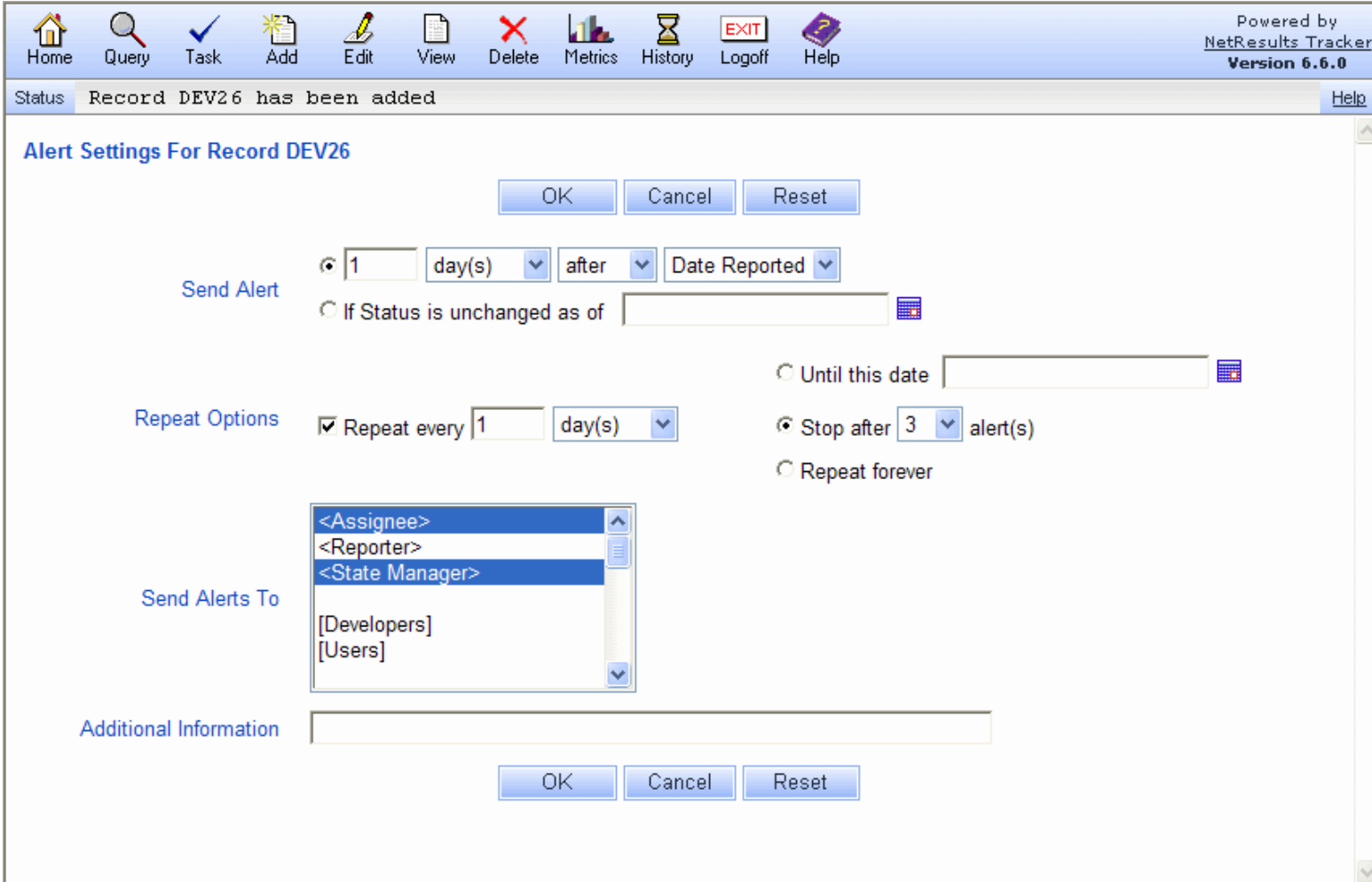
6. If you wish to add another attachment, check the Add Another Attachment box at the bottom. If you've been given the privilege to add either types of attachments, select File or URL from the pulldown. You will then be prompted to enter the attachment description and to add the file or URL for the second attachment. If you do not wish to add another attachment, simply click on the OK button to complete the operation.

After you have added a record (and if you have been given the appropriate privileges by your Administrator), you can add more attachments and/or edit or delete existing attachments by following the directions in the [Record Attachments](#) section of the Help.

Setting an Alert (Enterprise Edition Only)

 Alerts are email notification messages that can be configured for a record. You can set an alert to remind you about a particular record at a later date and time. You can also set an alert to be sent to other users and groups in your organization.

Depending on the product you selected, you may have the option to set an alert for the record you are creating. If you are allowed to set an alert for the record, the box Set Alert will appear at the bottom of the Add form. Check the box if you wish to set an alert for the record. After clicking the Add or Add & Copy button, the Alert settings will be displayed as shown below.



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Status Record DEV26 has been added [Help](#)

Alert Settings For Record DEV26

OK Cancel Reset

Send Alert

1 day(s) after Date Reported

If Status is unchanged as of

Until this date

Repeat Options

Repeat every 1 day(s)

Stop after 3 alert(s)

Repeat forever

Send Alerts To


<Assignee>
<Reporter>
<State Manager>
[Developers]
[Users]

Additional Information

OK Cancel Reset

Details on configuring Alert settings during the Add operation can be found in the [Alerts](#) section.

Start a Discussion (Enterprise Edition Only)

 A discussion can be initiated for a record using the Start Discussion check box at the bottom of the Add page. The Discussion feature allows users to discuss topics related to a record in parallel to a record's progress through the workflow. When starting a discussion for a record, you can invite other users and groups to participate in the discussion.

If you have the user group privileges required to initiate a discussion, check the box for Start Discussion. After clicking on the Add or Add & Copy button to save the new record, you will be prompted with the Discussion settings as shown below:

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

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Status Starting New Thread Help

Start New Thread for Record DEV5

OK Cancel

Subject Secondary Testing

Message
Intial testing has been completed. Is there a decision on which methods will be used for the second phase of testing?

Invite Users or User Groups To This Discussion

- [Admins]
- [Developers]
- [Managers]
- [Publications]
- [QA]
- [Support]
- [Users]

OK Cancel

Details on starting a Discussion during the Add operation can be found in the [Discussion](#) section.

The View Page, a read only page, is where all the information in a record such as [fields](#), [attachments](#), [source code files](#), [clone information](#), [alerts](#), [discussion](#) and [record history](#) can be viewed.

View Record DEV8		Task Edit Print Format for Printing Add Similar
PRN ?	DEV8	
Project	Product Development	
Form	Issue	
Title ?	Add support for gif file types	
Product ?	Our Paint Program	
Last Updated Date	03/28/2009 09:18:31 AM	
Platform ?	Windows XP	
Reported In Version ?	3.2.None.None	
Request Type ?	Enhancement	
Severity ?	5 (Med Impact - Med %)	
Description ?	==== 03/03/2009 02:39:48 PM [UTC-0700] ==== Development Manager ==== Many web sites use the .gif type.	
Workaround ?		
Reported By ?	<u>Development Manager</u>	
Date Reported ?	03/03/2009 01:39:07 PM	
Status ?	Tested	
Related Tickets ?	<u>SUP8</u> (Support additional image types, Our Browser)	
Assigned To ?	<u>Build Manager</u>	
Estimated Size ?	0.0	
Planned For Version ?	3.5.None.None	
Priority ?	2	
Released In Version ?	None.None.None.None	
Total Time ?	5.0	
Fix Date ?	03/24/2009 01:48:29 PM	
Fix Detail ?	==== 03/24/2009 01:48:51 PM [UTC-0700] ==== Developer One ==== Added enhancement per spec.	
Test Date ?	03/24/2009 09:18:12 AM	

There are two ways to view a record:

From a report on the Home or Query pages:
Click on the View icon to the left of a record in the report

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Status Home Page - Ready

Welcome Developer One 04/23/2009 01:41:47 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users] 4 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Using the View icon on the Button bar:

Click on the View icon on the Button Bar at the top. The Search Window will appear. You can enter the record number you would like to see and click Go to go to the View Page for the record number specified.

Powered by NetResults Tracker Version 6.6.0

Status Home Page - Ready

Welcome Developer One 04/23/2009 01:41:47 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users] 4 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new		In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversa		In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

View Record Close X

Enter PRN of the desired record:

DEV5 Go

Record Fields

The [top section](#) of the View Page consists of the record fields. The last time the record was modified is listed in the Last Updated Date field. This field may have a different label or may not be visible on the View Page depending on how it was configured by the Tracker Administrator. Other fields that are available are based on the configuration set up by the Tracker Administrator.

The field help will be displayed if you have checked the box for the Enable Field Help [preference](#) and your Tracker Administrator has entered information to describe this field with this feature enabled. If a Field Help icon is displayed, move your cursor over the icon to see a description of the field.

Key Fields

Because Tracker can support multiple projects and forms, the Tracker Administrator can select key fields when creating a form. Key fields are important fields that allow you to perform searches for [Link Fields](#), which are a special type of field that allows records to be cross-referenced. To find out which fields are the key fields for a certain form, go to the View Page for a record. The values of the key fields will be displayed in bold. In the [View Page sample](#), the fields "PRN" and "Title" are the key fields as their values are displayed in bold.

Viewing User Information

If you have been assigned permission to view user information and either the "Assigned To" or "Reported By" fields are displayed on the View page, you can click on the user's name to display the user's profile information such as phone, email, and address as shown below.

Field	Value
Full Name	Developer One
Company	Our Company
Email	dev_one@email.com
Phone	650-555-1212
Fax	650-555-1214
Address	1234 Technology Drive
City	Our Town
State / Province	CA
Zip / Pincode	94348
Country	USA
Comment	


Expanding TextArea fields

To see the full contents of the TextArea fields, use the scroll bar to the right of the field. Click on the "+" to the left of the field to expand the TextArea field to see the full contents or click on the "-" to collapse the field back the default size. The "Description" field in the [View Page sample](#) has the "+" displayed to expand the field. To change the default number of lines displayed for a TextArea field, change the "Display Window" value in the Multi-line Field Settings section in your [Preferences](#) page.

Link Fields




Link fields are fields that allow records to be linked to one another. For example, if different types of forms are available in your Tracker workgroup, your Tracker Administrator may have set up Link field so records created by one form can be linked to records created using another form. When a Link field is included on the View Page, any records that have been linked will be displayed as a clickable link (e.g. "SUP4" and "SUP21" in the Related Tickets field in the [View Page Sample](#) are records that have been linked to the record being viewed). Clicking on one of the linked records will take you to the View Page of that record.

Record Attachments

 To view a file attachment or go to the location of a URL attachment, click on the attachment description or the icon to the left of the description.




 To download a file attachment, click on the download icon.


More information can be found in the [Record Attachments](#) section.


Attachments		2 Attachments	
Description	File Name / URL		Type
 screen shot of error	error.jpg		File
 Tracker FAQ Page	http://www.netresultstracker.com/support/faq.html		URL

Source Code List

If you have been assigned permission to view the source code list, it will be displayed. Any source code file(s) associated with the record will be included on the source code list.

Source Code Files				1 Files
Operations	File	Project	Problem Version	Fixed Version
 	frmComment.frm	\$/PROJECT1/Project11/Project111/	 2.2	 2.3.1

 Each file on the source code list can be compared with other versions of the file. To compare the difference between two versions of a source code, click on the Differences icon to the left of the source code file name. Enter a version number for the Problem Version. If you wish to compare the oldest version of the file, leave the Problem Version field blank. Enter a version number for the Fixed Version. If you wish to compare with the latest version of the file, leave the Fixed Version field blank. Click OK to see the differences.

 A history is kept for each file on the source code list. To view the history of a file between two versions, click on the History icon to the left of the source code file name. Enter a version number for the Problem Version. If you wish to see the history since the oldest version of the file, leave the Problem Version field blank. Enter a version number for the Fixed Version. If you wish to see the history through the latest version of the file, leave the Fixed Version field blank. Click OK to see the history. More information on this feature, can be found in the [Source Code Control](#) section of this Help Guide.

Clone Info

If you have been assigned permissions to view clone information, this section will display information about and links to the "parent" record (one that the record being viewed was copied from) as well as the "children" (copies created from the record being viewed) of this record, if any. The information about parent and/or child records includes the record number, current status, and current assignee (owner). Additionally, if the record you are viewing is a clone (has a parent record), a parent link will be displayed in each section (Attachments, Record History, etc.) to allow you to quickly view the equivalent information in the parent record. For example, clicking on the parent link in the Attachments section will bring you to the View page for the parent with the page scrolled down to the Attachments section. The example below shows the record being viewed was cloned. Record 22 is the clone and is currently assigned to Developer One and in the "In Development" state.


Clone Info	
Cloned From (Parent)	None
Cloned As (Children)	22 (Developer One, In Development)

The example below shows the record being viewed is a clone. Record 16 is its parent and is currently assigned to Developer One and in the "In Development" state.

Clone Info	
Cloned From (Parent)	16 (Developer One, In Development)
Cloned As (Children)	None


Click [here](#) for more information about the Cloning feature.

Alerts - Enterprise Edition Only

 If Alert settings (available only in Tracker Enterprise Edition) have been configured for a record and you have been assigned permissions to view the alert settings, these will be displayed. Examples of the information shown in the alert settings section are whether alerts are set for the record, the date and time an alert will be sent, and whether the alert will be repeated. The [Alerts](#) section of this guide provides more details about using this feature.


Alert Settings	
Set Alert	No
Send Alert	1 day(s) after "Task Date" (05/10/2005 04:22:37 PM)
Next Alert Date	Not Set
Repeat Options	None
Additional Info	
Last Run Alert Date	05/11/2005 04:22:37 PM

Discussion - Enterprise Edition Only

 If a Discussion(s) (available only in Tracker Enterprise Edition) has been initiated for a record and you have been assigned permissions to view discussion messages, this will be displayed. The following discussion thread Information is displayed: the name of each thread, status (whether a thread has had new messages posted since you last viewed the thread), user who initiated the thread, number of messages, date and time of last update, and whether you are subscribed to the thread. The [Discussion](#) section of this guide provides more details about using this feature.

Discussion Threads						1 Threads
Thread	Status	Started By	Messages	Last Update	Subscribe	
Applet Discussion	UPDATED	QA One	3	05/10/2005 04:08:09 PM	No	

Record History

 If you have been assigned permission to view the record history, it will also be displayed. More information about the information displayed in this section can be found in the [Record History](#) section.

Record History							
Date	Action	By	Status	Assigned To	Product	Interface	Comment
04/26/2005 01:12:27 PM	ADD	QA One	Reported	Process Manager	Our Browser	WEB	
04/26/2005 01:12:52 PM	ATTACH_ADD	QA One	Reported	Process Manager	Our Browser	WEB	Added Attachment - Screen shot of error
04/26/2005 01:14:14 PM	THREAD_START	QA One	Reported	Process Manager	Our Browser	WEB	Thread Initiated - Applet Discussion
05/10/2005 04:20:41 PM	TASK	Process Manager	Scheduled	Development Manager	Our Browser	WEB	
05/10/2005 04:22:37 PM	TASK	Development Manager	In Development	Developer One	Our Browser	WEB	
06/08/2005 11:11:09 AM	CLONED_AS	Development Manager	In Development	Developer One	Our Browser	WEB	Cloned As 22

Tasking the Record

If you've been given the Task privilege by your Tracker Administrator, you can task the record that you are currently viewing by clicking on the Task link in the upper right corner. This will take you to directly to the [Task Page](#) for this record.

Editing the Record

If you've been given the Edit privilege by your Tracker Administrator, you can edit the record that you are currently viewing. Click on the Edit link in the upper right corner and this will take you directly to the [Edit Page](#) of this record.

Printing a Record

To print a record, click on the Print link in the upper right corner or use your browser's print function.

To view the record in the print format, click on the Format for Printing link in the upper right corner of the View Page.

On the Format For Printing page, either click on the Print link in the upper right corner or use your browser's print function to print the record. To return to the View page, click on the Format for Viewing link in the upper right corner.

Cloning a Record

If you have been assigned permission to Clone (create a copy of) a record, there will be a Clone link in the upper right corner of the View page. When you click Clone (and click OK to confirm that you wish to clone this record) a new record will be added with the same values for all fields as the record you are currently viewing. After the clone operation completes, the record number of the new record will be displayed in the Status bar and you will be viewing the clone ("child" record). You can then use the Edit or Task function to modify some of the fields in the child record. You can also search for clones by setting the "Clone:" criteria on the Query page to "Yes" (or including "<Clone> is True" as a Query Phrase in an Advanced Query). Additionally, you can include information about clones in a Report Layout by selecting "(Clone)" (this will add a column that displays Yes or No based on whether or not the record is a clone of another record) and/or "(Parent PRN)" (this will add a column that displays the record number of the parent record if it has a parent or -1 if not) as a column.

Your Tracker administrator can also configure some Task operations (Transitions) to combine the Clone and Task function into a single operation (a Task operation that will clone a record and then modify the clone). Cloning from the Task operation allows much greater control over when a record

may be cloned (based on the current Status of the record) and which fields (in the child record) must (or, optionally, may be) changed when a copy (clone) of a record is created. If your administrator has configured such Task operations, you may find that cloning from the View page has been disabled.

When the clone operation is performed, a Record History entry will be added to the parent record to note that a clone was created. Likewise, the child Record History will include an entry noting that it was created as a clone of another record. Information about "related" records is also available in the [Clone Info](#) section of the View page.

Note: When you use the Clone operation, only the fields will be copied from the original record. Associated information such as Attachments, Record History, Source Code File Associations, Discussion Threads, and Alert Settings will not be copied from the parent record. However, if you have been given permission to view clone info, you can easily view these items in the parent record by clicking on the parent link in the appropriate section of the child record (e.g. click the parent link in the Attachments section of the child to view the Attachments section in the parent). Also, if you use the Task operation to perform cloning, your administrator can configure (on a per Transition basis) whether or not to copy Attachments or Source Code File Associations to the clone (child record) during the Task operation.

Add Similar

If you don't wish to create an exact copy of the record you are viewing, but instead would like to add a new record that is similar to the existing record (or if you don't have permission to use the Clone operation), you can click the Add Similar link in the upper right corner of the View Page. This will bring you to the Add page and fill in all fields (that are displayed on the Add page) with values from the record you were viewing. You can then modify any field values and click the Add button to add a record similar to the one you were previously viewing.

Note: Unlike the Clone operation, no fields that are not visible on the Add page will be copied when you use Add Similar. Add Similar just sets the initial values for fields displayed on the Add page (it's as if you clicked the Add button and then set all the fields you see to exactly match those of the record you were viewing). In the case of the Status and Assigned To fields, it may not be possible to set these fields exactly as they are set in the record you were viewing because certain values may not be allowed on the Add page. If that occurs for either the Status or Assigned To fields, the Add page will be set with the default values for the Status and/or Assigned To field.

Clone vs. Add Similar

In general, Add Similar should be used when you want to create a new issue that starts at the first step in your workflow (business process). Clone should be used if you wish to have several issues share a common workflow (parent record) up to a certain point (step where the child records were created) or you wish to create (child) records to represent "subtasks" of the parent record (so, for instance, you could delegate parts of a larger task to other individuals and keep track of the status of the subtasks independently).

✓ To indicate that the work necessary for a particular process state has been completed you should use the Task operation.

There are various ways to perform the Task operation:

From a report on the Home or Query pages:

Click on the Task icon to the left of a record in the report.

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Status: Home Page - Ready

Welcome Developer One 04/23/2009 01:41:47 PM [UTC-0700] [Account Info](#) | [Preferences](#)

Assigned To Me [Users] 4 records [Print](#) | [Export](#) Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Reported By Me [Users] 2 records [Print](#) | [Export](#) Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Using the Task icon in the Button bar:

Click on the Task icon on the Button bar at the top. The Search Window will appear. You can enter the record number you would like to see and click Go to see the list of transitions available for the record number specified.

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Status: Home Page - Ready

Welcome Developer One 04/23/2009 02:33:25 PM [UTC-0700] [Account Info](#) | [Preferences](#)

Assigned To Me [Users] 4 records [Print](#) | [Export](#) Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new		In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversa		In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Task Record Close X

Enter PRN of the desired record:

DEV5 Go

Reported By Me [Users] 2 records [Print](#) | [Export](#) Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Depending upon the current state, there may be one or more choices displayed in order to mark a task complete. The choices, called Transitions, can be displayed as clickable buttons, radio buttons, or a pulldown menu.

The screenshot shows the NetResults Tracker application interface. At the top, there is a navigation bar with icons for Home, Query, Task, Add, Edit, View, Discuss, Delete, Metrics, History, Logoff, and Help. The text "Powered by NetResults Tracker Version 6.6.0" is displayed in the top right corner. Below the navigation bar, the status bar shows "Tasking Record DEV25" and a "Help" button. The main content area displays a dialog box titled "Task Record DEV25, Current State: 'Reported'". The dialog box contains the following text and options:

Please select an operation below and click OK.

- Schedule**
Scheduled the record for development.
- Defer**
Defer the record to be addressed at a later time.
- Close**
Close the record because the issue have been resolved.
- Mark Duplicate**
The record is a duplicate of an existing one. Mark this record as duplicate.

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Task Fields

Once you select a choice, the next screen will show the appropriate fields required to be filled out for completing a task.

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Home Query Task Add Edit View Discuss Metrics History Logoff Help

Status Tasking Record SUP5 [Help](#)

OK Cancel

Explain the reason for closing the ticket in **Close Detail**. Select any related KB articles or Dev issues in the Link Fields, if applicable. The ticket will be moved to the Closed state and assigned to TBD (no one). Fields marked with *, **Bold** and **Color** are required.

Detailed information about the issue being reported (when it happens, what steps are needed to reproduce the issue, etc.)

Description

Close Date The date the issue was closed
12/29/2009 01:40:22 PM

Detailed information about what was done to resolve the issue. If the issue was not resolved, this contains an explanation of why the issue was closed.

Close Detail * (additional)

Knowledge Base articles related to this ticket


Related Knowledge Base Article


History Comment *

Set Alert

Options Add Attachment(s)

Fields and / or a history comment may be displayed after selecting a transition. The fields presented are called task fields. Some of these fields may be for your information only (read-only task fields) and cannot be modified. Other fields including the history comment may require a modification before you can click OK to proceed. Depending on how your Tracker has configured the system, there may be some text above the task fields to explain which are required. For example, the following text or something similar can be displayed to identify required fields: "Fields marked with *, **Bold** and **Color** are required fields."

The field help will be displayed if you have checked the box for the [Enable Field Help](#) preference and your Tracker Administrator has entered information to describe this field. If a Field Help icon  is displayed, move your cursor over the icon to see a description of the field.

 When a date field is present during the Task operation, you can click on the calendar icon to select a date or you can manually enter a date in the appropriate format (e.g. "mm/dd/yyyy HH:MM:SS AM/PM" or the date & time format selected in the [Preferences](#) section.). The time component is optional. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in **red** are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.

July 2007						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

: : :

When large text fields are present, an Annotate button may be displayed to the left of the field. Clicking on the Annotate button will add a date and time stamp with your User ID to the field. This makes it easy to distinguish which information within the field has been added by you or another user.

To view the full contents of the large text fields, use the scroll bar on the right of the field. Alternatively, the number of lines displayed for these large text fields can be customized by setting the value of the Display Window option in the Multi-line Field Settings section on your [Preferences](#) page.

When a pulldown field is present, it may be displayed as a traditional pulldown, radio buttons, vertical radio buttons or a search pulldown. When a field is displayed as a search pulldown, you can enter key words to find any option menu items that match your criteria. To make a selection in a search pulldown, click on the Set button to the right of the field, type in one or more key words and click on the Find button. Any items that matched your criteria will be displayed, click on the item you wish to select, then click on the Set button (or simply double click on the item you wish to select).

Your Tracker may have been configured to have dependent pulldown fields. Dependent pulldowns are pulldown fields where the option menu values displayed in one pulldown are determined by the value selected in the pulldown it is dependent on. If you change the value selected in a parent pulldown field, it may change the values available in the child pulldown menu based on the relationship set up between the two fields.

Link fields are fields that allow records to be linked to one another. For example, if different types of forms are available in your Tracker workgroup, your Tracker Administrator may have set up Link field so records created by one form can be linked to records created using another form. When a Link field is presented during the Task operation, any records that have been linked will be displayed. To add items to the Link field, click on the Set button. A list of items that can be added will be displayed (if you are using a browser other than Internet Explorer, the list will not be displayed until you click on the Find button). To search for items using a key word(s), type the key word(s) into the Search Criteria field and click on the Find button. Any items that matched your key word(s) will be displayed. The key word(s) are searched within the key fields for the forms you are searching. Because Tracker can support multiple projects and forms, the Tracker Administrator can select key fields when creating a form. To find out which fields are the key fields for a certain form, go to the View Page for a record. The values of the key fields will be displayed in bold. In the [View Page sample](#), the fields "PRN" and "Title" are the key fields as their values are displayed in bold. When a Release Number field is a key field, the value you enter into the Search text box will be searched within each individual digit of the Release Number field. For example, you can search using values like "1", "Beta 2", etc. Basically, you can search for the items that are configured as choices in the Release Number field. However, you cannot search for a combination of multiple digits at once. For example, if you enter "1.2" into the Search text box in an attempt to find records that have values like "1.2.0.None", "1.2.0.Beta 1", "1.2.1.-", you will get 0 matches because it will search for the value "1.2" within each individual digit of the Release Number. To select an item, click on the item. To select multiple items, hold down the Ctrl button on your keyboard while clicking on the items to be added. Click on the Add or Set button to add the selected items to the Link field. To remove items from the Link field, click on the item, then click on the Remove button. To select multiple items, hold down the Ctrl button on your keyboard while clicking on the items to be deleted.

If the Link Field has been configured to allow more than one item to be linked, you will see the total number of items that are currently linked ("Count") and the maximum number of items ("Max") that can be linked below the Set and Remove buttons.

Attachments

If your Tracker Administrator has configured the transition you selected to allow attachments to be saved to the record, the option Add Attachment(s) will be available. Check the box for this option if you wish to save an attachment to the record you are processing. To add a File or URL attachment to the record:

1. Check the Add Attachment box at the bottom of the Add page
2. If you've been given the privilege to add either types of attachments, select File or URL from the pulldown.
3. Click on the OK button to complete the Task operation
4. Enter a meaningful description for the Attachment (this will be displayed when someone subsequently views the record) in the Attachment Description field.
5. For file attachments, click the Browse button (to the right) to select the file from your local machine.

For URL attachments, enter the fully qualified URL into the field provided.

6. If you wish to add another attachment, check the Add Another Attachment box at the bottom. If you've been given the privilege to add either types of attachments, select File or URL from the pulldown, then click OK to proceed. You will then be prompted to enter the attachment description and to add the file or URL for the second attachment. If you do not wish to add another attachment, simply click on the OK button to complete the operation.

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Status Record 21 has been added [Help](#)

Add Attachment To Record 21

OK Cancel

Attachment Description Error message text

Attachment File C:\Temp\error.txt Browse...

Add Another File Attachment

OK Cancel

Source Code Files

If your Tracker Administrator has configured the transition you selected to allow source code files to be associated to the record, the option Associate Source Code File(s) will be available. Check the box for this option if you wish to associate source code files to the record you are processing. To associate a source code file to a record:

1. During the Task operation, the option Associate Source Code File(s) will be available. Check the box to associate source code file(s) to the record you are processing.
2. After clicking OK, a new form will appear. The left column will show a directory listing the projects in your Source Code Control database. "\$" denotes the root of the database. Double click on a project folder to expand it one level. Navigate to find the file you wish to associate to the record. The list of files will appear on the right column. Select a file in the right column by clicking on it.
3. If desired, enter a version number in the field The problem was found in version.
4. If desired, enter a version number in the field The problem was fixed in version.
5. If you wish to associate another source code file, check the box for the option Associate Another Source Code File, then click OK to complete the operation. If you checked the box to associate another source code file, repeat the above steps to associate another file.

After you have processed a record using the Task operation (and if you have been given the appropriate privileges by your Administrator), you can associate more source code files and/or remove existing files by following the directions in the [Source Code Control](#) Help section.

General Information about the Task operation

Note that once you click OK to complete the Task operation, Tracker automatically advances the record to the next process state, and assigns the record to the next appropriate user.

If your Tracker Administrator has configured the transition you selected to "clone" (create a copy of) the record you originally selected, the Task operation will first create a copy of the original record, then the Task operation will be performed on the clone (child record). All of the fields you update (Task Fields) and other changes (such as assignment and status changes) that are made by the Task operation will be made to the clone. When a Task operation that clones a record completes, the record number that is displayed will be the record number of the (newly created) clone, not the (parent) record you originally selected. Typically, the Transition name will also reflect the fact that a clone operation will be done (e.g. "Copy Record", "Add Subtask", etc.). Review the [Cloning a Record](#), section of the View page Help for further information on record cloning.

After clicking on the OK button, if your Tracker workgroup is set up to send email notification messages when a record has been processed using the Task operation, you will see a message "Sending Email Notifications...Please wait". This message indicates that the changes to the record have been saved and Tracker is sending the email notification messages.

Alerts (Enterprise Edition Only)

Alerts are email notification messages that can be configured for a record. You can set an alert to remind you about a particular record at a later date and time. You can also set an alert to be sent to other users and groups in your organization.

If you have been given the appropriate privileges, you may be given the option to set an alert during the Task operation as shown below. Details on how to configure Alert settings during the Task operation can be found in the [Alerts](#) section.

Set Alert

Send Alert 1 day(s) after <Task Date>

If Status is unchanged as of

Repeat Options

Repeat every 1 day(s)

Until this date

Stop after 3 alert(s)

Repeat forever

Send Alerts To

<Assignee>
<Reporter>
<State Manager>
[Admins]
[Users]

Additional Information

OK Cancel



Editing Records

A record can be edited to make changes to the [fields](#), [attachments](#), [source code files](#), [alerts](#) and [record visibility](#). In organizations where the workflow process is very structured, the Edit operation is generally reserved for managers or users who need to handle special cases as they arise while the majority of users use the [Task](#) operation to process records. In organizations where processes are less formal, the Edit operation may be the preferred method of processing records for all users.

There are various ways to perform the Edit operation:

From a report on the Home or Query pages:
Click on the Edit icon to the left of a record in the report.

Powered by NetResults Tracker Version 6.6.0

Status: Home Page - Ready

Welcome Developer One 04/23/2009 01:41:47 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users] 4 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Using the Edit icon in the Button bar:

Click on the Edit icon on the Button bar at the top. The Search Window will appear. You can enter the record number you would like to see and click Go to go to the Edit Page of the record specified.

Powered by NetResults Tracker Version 6.6.0

Status: Home Page - Ready

Welcome Developer One 04/23/2009 03:09:33 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users] 4 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new		In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversa		In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

Edit Record Close

Enter PRN of the desired record:

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Once you've selected a specific record, the Edit Page will be displayed.

Home Query Task Add Edit View Discuss Delete Metrics History Admin Order Logoff Help Powered by
NetResults Tracker
Version 6.6.0

Status Editing Record DEV22 Help

Edit Record DEV22 [Attachments](#) | [Source Code Files](#) | [Alerts](#)

[Update Fields \(OK\)](#)

History Comment *

This operation should only be used for **special cases**. If this is not a special case, please use the **Task** icon instead. If you have any questions, please refer to the [Help Guide](#).

PRN DEV22

Project Product Development

Form Issue

A brief summary of the issue being reported

Title

The product involved in the issue being reported

Product [Set](#)

Platform Macintosh Windows 2003 Windows XP

Reported In Version . . .

Request Type Severity Custom Work?

Priority 1
 2
 3
 -Select-

Description

[Annotate »](#)

Reported By

Date Reported

Editing Fields

The edit form allows you to directly modify any field of the record. This can be useful if you wish to update a description, or force a record to a particular process state (for instance, mark a record as "Released" before it has been tested). After making changes to the fields on the Edit page, click on the Update Fields (OK) button to save your changes.

If you have made changes to the fields on the Edit page, but do not wish to save the changes, you can click on the Cancel button to abort your changes and immediately return to the previous page you were viewing. Or, if you have made changes, but wish to reset the fields to their previous values (the values the fields had before you made changes), you can click on the Reset button to restore the original values of the fields.

When you edit the record you can also enter a comment that will be saved in the [history](#) for the record. This can be useful in the future to help determine why the record was edited. Up to 2000 characters can be entered into the History Comment field.

The field help will be displayed if you have checked the box for the Enable Field Help [preference](#) and your Tracker Administrator has entered



information to describe this field. If a Field Help icon is displayed, move your cursor over the icon to see a description of the field.

When a date field is present on the Edit Page, you can click on the calendar icon to select a date or you can manually enter a date in the appropriate format (e.g. "mm/dd/yyyy HH:MM:SS AM/PM" or the date & time format selected in the [Preferences](#) section.). The time component is optional. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.

July 2007						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Buttons: Now, Set Time, OK, Cancel

When large text fields (TextArea) are present, an Annotate button will be displayed to the left of the field. Clicking on the Annotate button will add a date and time stamp with your User ID to the field. This makes it easy to distinguish which information within the field has been added by you or another user.

To view the full contents of the large text fields, use the scroll bar on the right of the field. Alternatively, the number of lines displayed for these large text fields can be customized by setting the value of the field Display Window in the Multi-line Field Settings section on your [Preferences](#) page.

When a pulldown field is present on the Edit page, it may be displayed as a traditional pulldown, radio buttons, vertical radio buttons or a search pulldown. When a field is displayed as a search pulldown, you can enter key words to find any option menu items that match your criteria. To make a selection in a search pulldown, click on the Set button to the right of the field, type in one or more key words and click on the Find button. Any items that matched your criteria will be displayed, click on the item you wish to select, then click on the Set button (or simply double click on the item you wish to select).

Your Tracker may have been configured to have dependent pulldown fields. Dependent pulldowns are pulldown fields where the option menu values displayed in one pulldown are determined by the value selected in the pulldown it is dependent on. If you change the value selected in a parent pulldown field, it may change the values available in the child pulldown menu based on the relationship set up between the two fields.

After clicking on the Update Fields (OK) button, if your Tracker workgroup is set up to send email notification messages when records are edited, you will see a message "Sending Email Notifications...Please wait" in the Status bar. This message indicates that the changes have been made to the record and Tracker is sending the email notification messages.

Link Fields

Link fields are fields that allow records to be linked to one another. For example, if different types of forms are available in your Tracker workgroup, your Tracker Administrator may have set up Link field so records created by one form can be linked to records created using another form. When a Link field is included on the Edit Page, any records that have been linked will be displayed. To add items to the Link field, click on the Set button. A list of items that can be added will be displayed (if you are using a browser other than Internet Explorer, the list will not be displayed until you click on the Find button). To search for items using a key word(s), type the key word(s) into the Search Criteria field and click on the Find button. Any items that matched your key word(s) will be displayed. The key word(s) are searched within the key fields for the forms you are searching. Because Tracker can support multiple projects and forms, the Tracker Administrator can select key fields when creating a form. To find out which fields are the key fields for a certain form, go to the View Page for a record. The values of the key fields will be displayed in bold. In the [View Page sample](#), the fields "PRN" and "Title" are the key fields as their values are displayed in bold. When a Release Number field is a key field, the value you enter into the Search text box will be searched within each individual digit of the Release Number field. For example, you can search using values like "1", "Beta 2", etc. Basically, you can search for the items that are configured as choices in the Release Number field. However, you cannot search for a combination of multiple digits at once. For example, if you enter "1.2" into the Search text box in an attempt to find records that have values like "1.2.0.None", "1.2.0.Beta 1", "1.2.1.-", you will get 0 matches because it will search for the value "1.2" within each individual digit of the Release Number.

To select an item, click on the item. To select multiple items, hold down the Ctrl button on your keyboard while clicking on the items to be added. Click on the Add or Set button to add the selected items to the Link field. To remove items from the Link field, click on the item, then click on the Remove button. To select multiple items, hold down the Ctrl button on your keyboard while clicking on the items to be deleted.

If the Link Field has been configured to allow more than one item to be linked, you will see the total number of items that are currently linked ("Count") and the maximum number of items ("Max") that can be linked below the Set and Remove buttons.

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

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Status Editing Record DEV24 Help

Edit Record DEV24
[Attachments](#) | [Alerts](#)

Update Fields (OK) Cancel

History Comment *

This operation should only be used for **special cases**. If this is not a special case, please use the **Task** icon instead. If you have any questions please refer to the [Help Guide](#).

PRN DEV24

Project Product Development

Form Issue

Title

Product Set

Platform MAC OS X
 Windows 2003
 Windows Vista

Reported In Version . . .

Request Type Severity

Description

Annotate »

Reported By Developer One

Date Reported 05/06/2009 11:49:53 AM

Related Development Tickets

Find

3 items found

DEV21 (Display new field without requiring database reload)

DEV23 (Reload from database to slow)

DEV24 (database transaction redundancy)

Set Cancel

Status

Substatus

Assigned To

Estimated Size

Planned For Version . . .

Released In Version . . .

Record Attachments

The edit page also allows you to add, edit, or remove an attachment for the record. The [Record Attachments](#) section contains more details.

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

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Status Attachment Added Successfully Help

Edit Attachments For Record DEV26 2 Attachments

File Add New Attachment OK

Options	Attachment Description	File Name / URL	Type
Edit Delete	Screenshot of error message	crash_error.gif	File
Edit Delete	NetResults Tracker Knowledge Base	http://kb.nrtracker.com	URL

File Add New Attachment OK

Source Code Control

If you have been assigned permission to edit the source code list, you will be able to add, edit or remove source code files for the record. The [Source Code Control](#) section has more details about this feature.

Alerts - Enterprise Edition Only

If you have been assigned permission to edit the alert settings for a record, you will be able to set up an alerts for the record as shown below. Refer to the [Alerts](#) section of this Help Guide for more information on setting an Alert for a record.

Edit Alert Settings For Record REC0

OK Cancel

Set Alert Yes No

Send Alert 1 day(s) after Test Date If Status is unchanged as of

Repeat Options Repeat every 1 day(s) Stop after 3 alert(s) Repeat forever

Send Alerts To

- <Assignee>
- <Reporter>
- <State Manager>
- [Admins]
- [Users]

Additional Information

OK Cancel

Modifying Record Visibility

If Record Visibility has been enabled, and you are a member of a user group that is allowed to modify the visibility of a record to user groups, the field Make Visible to These User Groups will appear. This field is a selection list at the bottom of the page which allows you to select to which user groups this record should be visible. To select more than one user group, hold down the shift or control key while clicking on the user groups. If you wish to make a record visible only to the Admins user group, click on the blank space at the bottom of the list.

NetResults Tracker Help nr

Record Attachments Help Topics << >>

Tracker allows you to associate as many files as you wish with a record. These "attachments" can be anything from an image file, to a customer email or a website URL.

Attachments are presented as a list of standard HTML hyperlinks when the record is viewed by the user, and are presented to the user in a new browser window when clicked.

Adding an Attachment

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Status Record 21 has been added Help

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Add Attachment To Record 21

OK Cancel

Attachment Description: Error message text

Attachment File: C:\Temp\error.txt Browse...

Add Another File Attachment

OK Cancel

An attachment file can be included with a record when the record is first created (see [Adding Records](#)), when processing records (see [Marking a Task Complete](#)) or it can be added to a record by following these steps:

1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon
2. Click on the Attachments link in the upper right corner of the Edit Page. A form appears that displays the current attachments associated with the record.
3. Select the type of attachment you are adding. File is a file which will be uploaded to your server. URL is a URL specification (which is not uploaded to the server). The URL attachment type may be useful when tracking problems on web sites.
4. Click on the Add New Attachment button
5. In the form displayed, enter a meaningful description of this attachment in the Attachment Description: field
6. If you have selected a File attachment, use the Browse button to select the file from your local machine. If you have selected a URL attachment, type in the URL you wish to add as an attachment. Please include the protocol portion of the URL (e.g. http://, ftp://, file://, etc.) for URL attachments. Without the protocol portion entered in the URL, you won't be able to use the link you have saved.
7. Click on the OK button

If you should encounter any errors when uploading files to the server, a list of the files which encountered problems and the associated error messages will be displayed at the top of the next page.

Editing an Attachment

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Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Status Attachment Added Successfully Help

Edit Attachments For Record DEV26 2 Attachments

File Add New Attachment OK

Options	Attachment Description	File Name / URL	Type
Edit Delete	<u>Screenshot of error message</u>	crash_error.gif	File
Edit Delete	<u>NetResults Tracker Knowledge Base</u>	http://kb.nrtracker.com	URL

File Add New Attachment OK

To edit an existing attachment, follow these steps:




1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon
2. Click on the Attachments link in the upper right corner of the Edit Page. A form appears that displays the current attachments associated with the record.
3. Locate the desired attachment in the table and click on the Edit button that appears in the same row
4. In the form displayed, edit the attachment URL or description. If the attachment is a File attachment, you will not be presented with the option to edit the URL.
5. Click on the OK button

Removing an Attachment


To delete an existing attachment, follow these steps:


1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon
2. Click on the Attachments link in the upper right corner of the Edit Page. A form appears that displays the current attachments associated with the record.
3. Locate the desired attachment in the table and click on the Delete button that appears in the same row
4. Click on the OK button

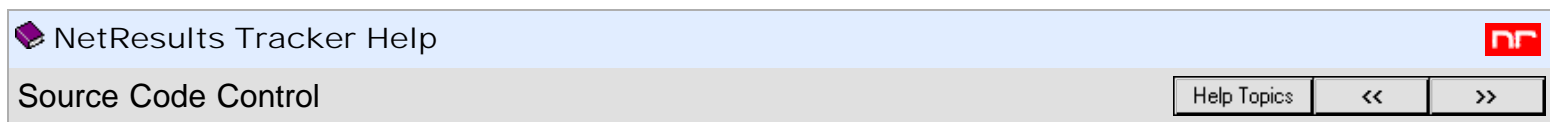
Viewing Attachments

Attachments		2 Attachments	
Description	File Name / URL		Type
 screen shot of error	error.jpg		File
 Tracker FAQ Page	http://www.netresultstracker.com/support/faq.html		URL

Attachments to records appear as a list of descriptions and clickable links when the record is [viewed](#).





 To view a file attachment or go to the location of a URL attachment, click on the attachment description or the icon to the left of the description.

 To download a file attachment, click on the download icon. The action that occurs when the link is clicked depends upon the actions defined for each file type in the user's browser and on the file extension to file type mapping used by your web server. Please refer to your web browser's documentation for details on how to set up actions to handle various file types. Please contact your web site administrator if a file is not being mapped to the appropriate file type by your web server.



Tracker allows you to associate any source code file from your Source Code Control system to a record.

The source code files are presented as a list when the record is viewed as shown below.

Source Code Files 1 Files				
Operations	File	Project	Problem Version	Fixed Version
 	frmComment.frm	\$/PROJECT1/Project11/Project111/	 2.2	 2.3.1

The source code list within each record can be edited to add or remove source code file associations.

In addition, a history of older versions of each source code file can be viewed. The older versions can be compared to display the differences within the source code file.

Source Code Control Login Settings

Each user must supply their SourceSafe Login Settings in order to edit the source code list.

To enter the login information, each user should:

1. Login to the [workgroup](#)
2. Click on the Preferences link
3. In the SourceSafe Login Settings section, enter the User ID and Password he or she uses to access the Microsoft Visual SourceSafe database
4. Click OK to save these settings

Associating a Source Code File to a Record

Source code files can be associated to a record when processing a record (see [Marking a Task Complete](#)) or by using the steps below:

1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon.
2. Click on the Edit Source Code List button. A form appears that displays the current source code files associated with the record.
3. Click on the button labeled Add New Source Code File.
4. A new form will appear. The left column will show a directory listing the projects in your Source Code Control database. "\$" denotes the root of the database. Double click on a project folder to expand it one level. Navigate to find the file you wish to associate to the record. The list of files will appear on the right column. Select a file in the right column by clicking on it.
5. If desired, enter a version number in the field The problem was found in version.
6. If desired, enter a version number in the field The problem was fixed in version.
7. Click OK to associate the file to the record. A confirmation message will be displayed, click OK to proceed.

Editing the List of Source Code Files

For each source code file that has been associated with a record, you can edit the version information in the fields The problem was found in version and The problem was fixed in version. You can also replace the source code file with another one from the Source Code Control database.

To edit an entry on the Source Code List:

1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon.
2. Click on the Edit Source Code List button. A form appears that displays the current source code files associated with the record.
3. Click on the Edit button to the right of the entry you wish to modify.
4. To replace a file, navigate to the appropriate project folder in the left column, then double click on the file name in the column on the right.
5. If desired, modify the fields The problem was found in version and The problem was fixed in version.
6. When modifications are complete, click OK, then OK again to confirm.

Removing a Source Code File Association from a Record

To remove a file from the Source Code List:

1. Edit the desired record, either by navigating to it via a query result, or via the Edit icon.
2. Click on the Edit Source Code List button. A form appears that displays the current source code files associated with the record.

3. Click on the Delete button to the right of the entry you wish to delete, then click OK to confirm.

Viewing the History of a Source Code File



The history of each source code file can be accessed via the source code list within a record. The history has an entry for each version of the file that has been checked into the source code control database. The history information collected for each version includes file type, date of action (check-in, check-out, etc.), user who performed action, and any comments entered about the action. From this list of history entries, you can generate a comparison between two versions of the source code file.

To view the history for a source code file:

1. View the desired record, either by navigating to it via a query result, or via the View icon.
2. Scroll down to the list of Source Code files associated with the record.
3. Click on the History button to the left of the source code file you wish to see.
4. If desired, enter a version number in the fields Problem Version and Fixed Version. Leaving these fields blank will generate history information for all versions.
5. To see the details of a version listed in the history, click on the version you wish to see. The history details of the version will be displayed.
6. Additionally, a difference between versions can be generated from the history listing of a source code file. The two columns in the File History, called Base and Against, contain radio buttons where you can select 2 versions to compare for a list of differences. In the Base column, click on the radio button for the oldest version you wish to compare. In the Against column, click on the radio button for the latest version you wish to compare. Click on the Diff button at the top to generate the differences between the versions selected.

Comparing Versions of a Source Code File



The history contains an archive of each version of a source code file. Any two versions can be compared to display the differences. This is especially useful to be able to see the specific changes that were made in a source code file to fix a particular problem or introduce an enhancement.

There are 2 ways to generate a list of differences between 2 versions:

Method 1

1. View the desired record, either by navigating to it via a query result, or via the View icon.
2. Scroll down to the list of Source Code files associated with the record.
3. Click on the Differences button to the left of the source code file you wish to see.
4. If desired, enter a version number in the fields Problem Version and Fixed Version. Leaving these fields blank will compare the oldest and latest versions. Then, click OK to generate the list of differences.


Method 2

1. View the desired record, either by navigating to it via a query result, or via the View icon.
2. Scroll down to the list of Source Code files associated with the record.
3. Click on the History button to the left of the source code file you wish to see.
4. If desired, enter a version number in the fields Problem Version and Fixed Version. Leaving these fields blank will generate history information for all versions.
5. The two columns in the File History, called Base and Against, contain radio buttons where you can select the versions to compare. In the Base column, click on the radio button for the oldest version you wish to compare. In the Against column, click on the radio button for the latest version you wish to compare. Click on the Diff button at the top to generate the differences between the versions selected.

Querying Records for Source Code Information

Users that are members of user groups with the "View Source Code Files" privilege enabled are able to include Source Code related fields in the criteria of a standard or advanced query. The fields "Source Code File", "Problem Version", and "Fixed Version" are displayed in the standard and advanced query pages. You can enter text and version information into these fields to be used as search criteria in the query. For details on running queries, please refer to the [Querying Records](#) or [Advanced Queries](#) Help sections.

Note: This feature is only available in Tracker Enterprise Edition.

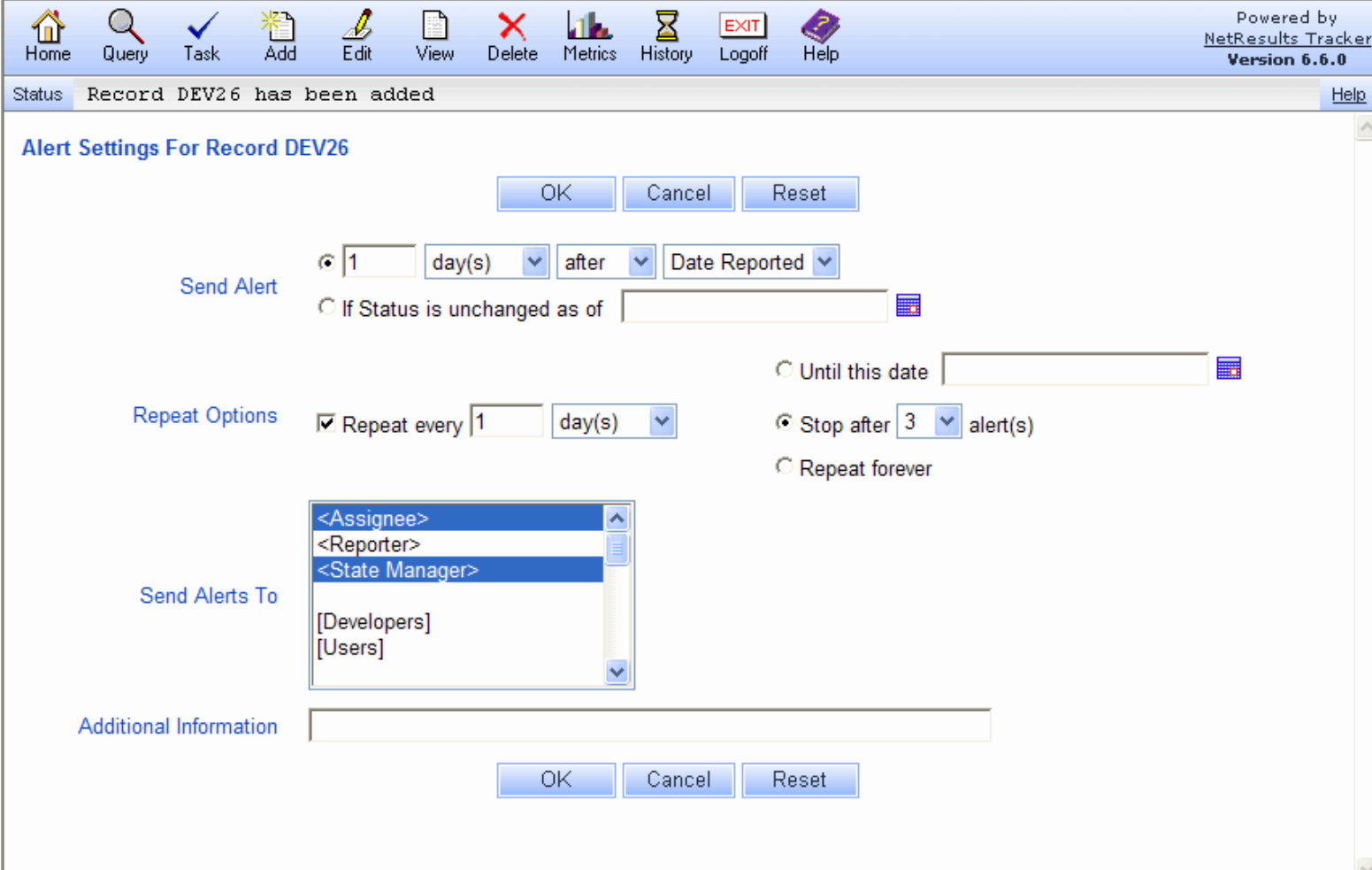
 Alerts are a form of email notification messages that can be triggered by a lack of change in a record's state within a certain time period. For example, a record should not stay within a particular state for longer than 2 days. An alert can be sent if the record is still within the same state after a period of 2 days has passed. Alerts can also be used as a reminder or alarm type feature; they can be triggered relative to any date field in the record or can be set to notify users at a certain date and time after a record has been processed using the Task operation.

Alerts can be configured per record. Each record can have different alert settings including when, how, how often, and to whom the alerts should be sent.

When specifying when to send an alert either for a given record or a transition, a fixed date and time can be entered or a date and time based on a date field within the record can be used. In addition, alerts can be sent once or configured to repeat periodically. Any combination of users and / or user groups can receive alerts for a particular record.

Setting Alerts during the Add Operation

Depending on the product you selected, you may have the option to set an alert for the record you are creating. If you are allowed to set an alert for the record, the box Set Alert will appear at the bottom of the Add form. Check the box if you wish to set an alert for the record. After clicking the Add or Add & Copy button, the Alert settings will be displayed as shown below.



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Version 6.6.0

Status Record DEV26 has been added [Help](#)

Alert Settings For Record DEV26

OK Cancel Reset

Send Alert

1 day(s) after Date Reported

If Status is unchanged as of

Until this date

Repeat Options

Repeat every 1 day(s)

Stop after 3 alert(s)

Repeat forever

Send Alerts To

<Assignee>
<Reporter>
<State Manager>
[Developers]
[Users]

Additional Information

OK Cancel Reset

- Send Alert

The user can select when the alert should be sent. A relative or absolute time can be specified. A relative time can be selected by choosing the radio button to the left of the option X <Interval> <before or after> <Date> where X can be any number from 1 to 99, <interval> can be hours, days, weeks, or months, and <Date> can be <Now> or another date field in the record. Example 1: If "5 days after <Now>" is selected, the alert will be sent 5 days after the record is added. Example 2: If "10 hours before <Due Date>" is

selected, the alert will be sent 10 hours before the date and time entered in the field called "Due Date" in the record.

If a date field is selected as the date to generate an alert and this date field has no value in a record, an alert will not be generated. If a date field is selected as the date to generate an alert and this date field is later removed from the record, then <Now> will be set as the date to generate an alert (to replace the date field that was removed).

An absolute time can be selected by choosing the radio button to the left of the option If state is unchanged as of <Date and Time> where <Date and Time> is any date and time you choose. The <Date and Time> entered should comply with the [date and time formats](#) in the user's preferences. For example, if the user has "mm/dd/yyyy" selected as the date format and "12 hour" as the time format, the information entered for <Date and Time> in the alert settings must be of the form "mm/dd/yyyy hh:mm:ss PM". The time component is optional. You can select a date by clicking on the Calendar icon. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.

- Repeat Options

The user can select whether an alert should be repeated after the first alert is sent. Checking the box to the left of Repeat every X <interval> will enable an alert to be sent multiple times. The user can enter any number from 1 to 99 and select hour, day, week, or month as the <interval>. An alert can be repeated until a particular date (select the radio button for Until this date <Date> and enter a date), or after the alert has been sent a particular number of times (select the option Stop after X alert(s) where X is a number from 1 to 10), or forever (select the option Repeat forever).

- Send Alerts To

The user can choose which users or user groups will receive the alert. To select multiple users and / or groups, hold down the CTRL button on your keyboard while clicking on the users / groups. Depending on the configuration selected by your Tracker Administrator, the user groups displayed may only be those groups of which you are a member.

- Additional information

Up to 150 characters can be entered. This information will be included in the alert notification email.

These alert settings will be in effect for the newly added record until the state is changed either via the Task or Edit operations or if the alert settings are changed in the [Edit Alerts](#) section.

Configuring Alert Settings during Task Operation

When the task operation is performed on a record, you may be prompted to configure alert settings as shown below.

The screenshot shows a dialog box titled "Set Alert" with the following fields and options:

- Set Alert:** A checked checkbox.
- Send Alert:** A radio button selected for "1 day(s) after <Task Date>" and another for "If Status is unchanged as of".
- Repeat Options:** A checkbox for "Repeat every 1 day(s)" and radio buttons for "Stop after 3 alert(s)" and "Repeat forever".
- Send Alerts To:** A list box containing "<Assignee>", "<Reporter>", "<State Manager>", "[Admins]", and "[Users]".
- Additional Information:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

- Set Alert

Checking the box for this option indicates an alert should be generated using the alerts settings below. Unchecking the box indicates that no alert should be sent.

- Send Alert

The user can select when the alert should be sent. A relative or absolute time can be specified. A relative time can be selected by choosing the radio button to the left of the option X <Interval> <before or after> <Date> where X can be any number from 1 to 99, <interval> can be hours, days, weeks, or months, and <Date> can be <Task Date> or another date field in the record. Example 1: If "5 days after <Task Date>" is selected, the alert will be sent 5 days after this task operation is complete. Example 2: If "10 hours before <Due Date>" is selected, the alert will be sent 10 hours before the date and time entered in the field called "Due Date" in the record.

If a date field is selected as the date to generate an alert and this date field has no value in a record, an alert will not be generated. If a date field is selected as the date to generate an alert and this date field is later removed from the record, then <Task Date> will be set as the date to generate an alert (to replace the date field that was removed).

An absolute time can be selected by choosing the radio button to the left of the option If state is unchanged as of <Date and Time> where <Date and Time> is any date and time you choose. The <Date and Time> entered should comply with the [date and time formats](#) in the user's preferences. For example, if the user has "mm/dd/yyyy" selected as the date format and "12 hour" as the time format, the information entered for <Date and Time> in the alert settings must be of the form "mm/dd/yyyy hh:mm:ss PM". The time component is optional. You can select a date by clicking on the Calendar icon. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.

- Repeat Options

The user can select whether an alert should be repeated after the first alert is sent. Checking the box to the left of Repeat every X <interval> will enable an alert to be sent multiple times. The user can enter any number from 1 to 99 and select hour, day, week, or month as the <interval>. An alert can be repeated until a particular date (select the radio button for Until this date <Date> and enter a date), or after the alert has been sent a particular number of times (select the option Stop after X alert(s) where X is a number from 1 to 10), or forever (select the option Repeat forever).

- Send Alerts To


The user can choose which users or user groups will receive the alert. To select multiple users and / or groups, hold down the CTRL button on the keyboard while clicking on the users / groups. Depending on the configuration selected by your Tracker Administrator, the user groups displayed may only be those groups of which you are a member.

- Additional information

Up to 150 characters can be entered. This information will be included in the alert notification email.

These alert settings will be in effect for the record until the state is changed either via the Task or Edit operations or if the alert settings are changed in the [Edit Alerts](#) section.


Editing Alert Settings

 A user can edit the alert settings for a record if they have the required privileges. A user can edit the alert settings for a record by clicking on the Edit icon in the top button bar and entering a record number or by clicking on the Edit icon next to a record number in a report on the Query or Home page. Clicking on the Alerts link in the upper right corner of the Edit Page will display the following alert settings for the record:

Edit Alert Settings For Record REC0

OK Cancel

Set Alert Yes No

Send Alert 1 day(s) after Test Date If Status is unchanged as of 

Repeat Options Repeat every 1 day(s) Stop after 3 alert(s) Repeat forever

Send Alerts To

<Assignee>
<Reporter>
<State Manager>
[Admins]
[Users]


Additional Information

OK Cancel

- **Set Alert**
Selecting Yes will send an alert based on the values below
- **Send Alert**
The user can select when the alert should be sent. A relative or absolute time can be specified. A relative time can be selected by choosing the radio button to the left of the option X <Interval> <before or after> <Date> where X can be any number from 1 to 99, <interval> can be hours, days, weeks, or months, and <Date> can be <Now> or another date field in the record. Example 1: If "5 days after <Now>" is selected, the alert will be sent 5 days after the alert settings are saved by clicking OK. Example 2: If "10 hours before <Due Date>" is selected, the alert will be sent 10 hours before the date and time entered in the field called "Due Date" in the record.

An absolute time can be selected by choosing the radio button to the left of the option If state is unchanged as of <Date and Time> where <Date and Time> is any date and time you choose. The <Date and Time> entered should comply with the [date and time formats](#) in the user's preferences. For example, if the user has "mm/dd/yyyy" selected as the date format and "12 hour" as the time format, the information entered for <Date and Time> in the alert settings must be of the form "mm/dd/yyyy hh:mm:ss PM". The time component is optional. You can select a date by clicking on the Calendar icon. Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.
- **Repeat Options**
The user can select whether an alert should be repeated after the first alert is sent. Checking the box to the left of Repeat every X <interval> will enable an alert to be sent multiple times. The user can enter any number from 1 to 99 and select hour, day, week, or month as the <interval>. An alert can be repeated until a particular date (select the radio button for Until this date <Date> and enter a date), or after the alert has been sent a particular number of times (select the option Stop after X alert(s) where X is a number from 1 to 10), or forever (select the option Repeat forever).
- **Send Alerts To**
The user can choose which users or user groups will receive the alert. To select multiple users and / or groups, hold down the CTRL button on the keyboard while clicking on the users / groups. Depending on the configuration selected by your Tracker Administrator, the user groups displayed may only be those groups of which you are a member.
- **Additional information**
Up to 150 characters can be entered. This information will be included in the alert notification email.

Note: This feature is only available in NetResults Tracker Enterprise Edition.

 The Discussions feature is a means of allowing users to communicate about various topics pertaining to a record. This allows users to collaborate without having to coordinate a meeting for everyone to contribute to the discussion. For example, a record may be assigned to a particular developer, but several developers are needed to provide input for an enhancement's design or the resolution of a bug. These discussions can continue in parallel to the record's progression through the workflow.

Discussions are also useful for archiving information for later use. For example, information on how to reproduce, workaround, or fix a bug can be addressed in a discussion thread. In a customer support organization, the discussion information would be useful to help the support team provide information to the customers as quickly as possible. Another example lies in integrating a new user into a project. The user can review the information present in the discussion to become familiar with the project's progress to date.

A discussion can be started for any record. The user initiating the discussion can invite other users or user groups to participate in the discussion. Within the discussion for each record, multiple threads can be started to discuss multiple topics. Users can post and reply to messages within a particular thread. Users can also choose to receive email messages to notify them about a new discussion or new posts to a discussion by subscribing to a discussion thread.

Preparation for using the Discussion feature

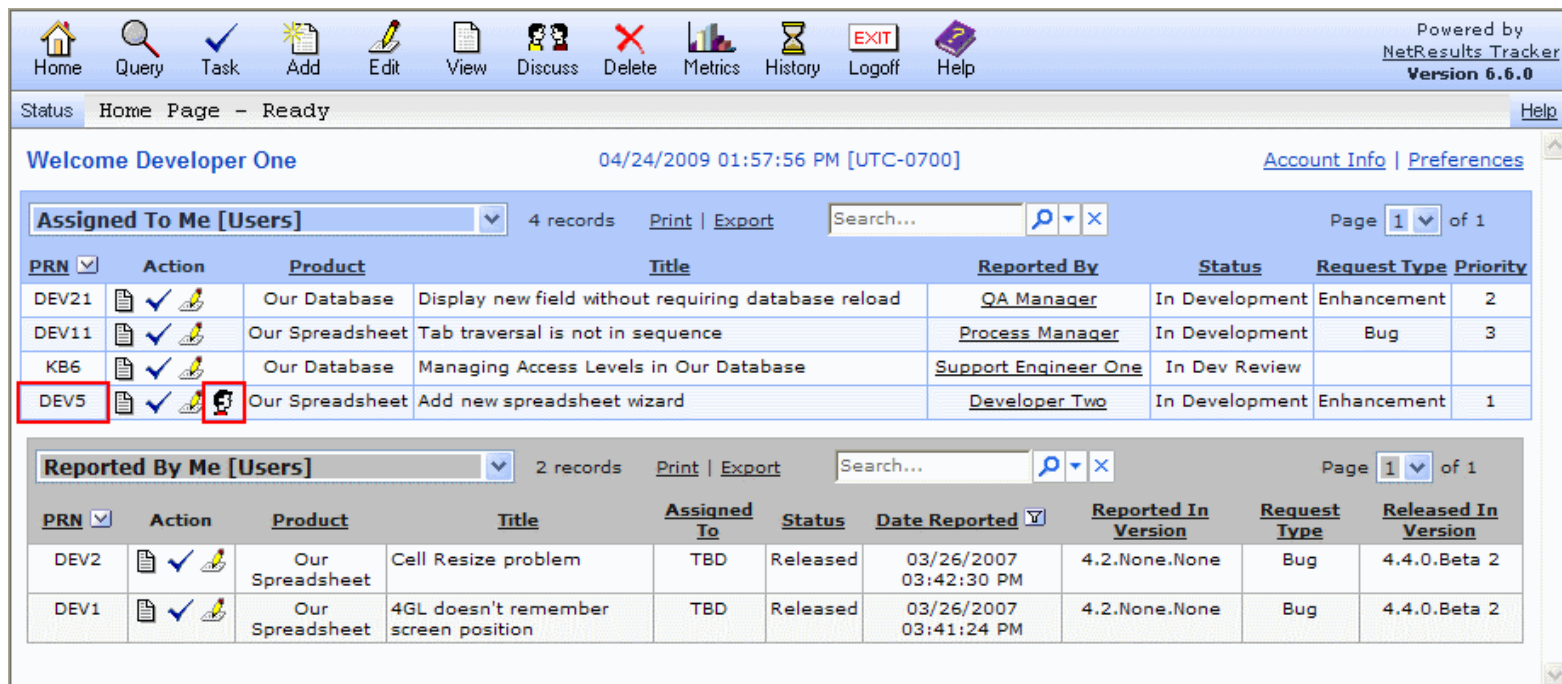
In order to use the Discussion feature, you must have the Discuss icon displayed in the top button bar. Please contact your Tracker Administrator if you do not have this icon displayed. When using the Discussion feature, you have the ability to set preferences that determine whether you should receive discussion invitations and new post notification messages by email. You can also choose how many lines of text you would like to display in the message window in the Discussion section. Review the [Preferences](#) section for details on how to customize these settings.

Access a Discussion

There are a various ways to access the Discussion section for a record:

From a report on the Home or Query pages:

If you are subscribed to a discussion for one of the records in the report, click on the Discuss icon to the left of the record.



The screenshot shows the NetResults Tracker interface. At the top, there is a button bar with icons for Home, Query, Task, Add, Edit, View, Discuss, Delete, Metrics, History, Logoff, and Help. The Discuss icon is highlighted with a red box. Below the button bar, there is a status bar showing "Status Home Page - Ready" and "Powered by NetResults Tracker Version 6.6.0". The main content area displays a report for "Developer One" on "04/24/2009 01:57:56 PM [UTC-0700]". The report has a filter set to "Assigned To Me [Users]" and shows 4 records. The records are listed in a table with columns: PRN, Action, Product, Title, Reported By, Status, Request Type, and Priority. The record with PRN "DEV5" is highlighted with a red box, and its Discuss icon is also highlighted with a red box. Below the first table, there is another table for "Reported By Me [Users]" showing 2 records with columns: PRN, Action, Product, Title, Assigned To, Status, Date Reported, Reported In Version, Request Type, and Released In Version.

PRN	Action	Product	Title	Reported By	Status	Request Type	Priority
DEV21		Our Database	Display new field without requiring database reload	QA Manager	In Development	Enhancement	2
DEV11		Our Spreadsheet	Tab traversal is not in sequence	Process Manager	In Development	Bug	3
KB6		Our Database	Managing Access Levels in Our Database	Support Engineer One	In Dev Review		
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two	In Development	Enhancement	1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Using the Discuss icon in the Button bar:

Click on the Discuss icon on the Button bar at the top, The Search Window will appear. You can enter the record number you would like to discuss and click Go to go to the Discussion section for the record number specified.

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Status Home Page - Ready Help

Welcome Developer One 04/24/2009 01:57:56 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users]

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV21		Our Database	Display ne						
DEV11		Our Spreadsheet	Tab traver						
KB6		Our Database	Managing Access Levels in Our Database						
DEV5		Our Spreadsheet	Add new spreadsheet wizard	Developer Two					

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

From an email notification message:

If your [Preferences](#) are set such that you receive a discussion invitation or new post notification by email, you can also reach the discussion by clicking on the URL listed in the email message.

Invitations and Subscriptions

Another user can invite you (or a user group in which you are a member) to participate in a discussion when he or she starts a new thread for a record. This invitation automatically subscribes you to a discussion thread. When you are subscribed to a discussion thread, this indicates you will receive notifications related to the thread based on your [Preferences](#).

If you are not invited to participate in a discussion thread, you can subscribe to the thread by performing the following steps:

1. Click on the Discuss icon in the top button bar and enter the appropriate record number
2. Check the box in the Subscribe column for the thread to which you want to subscribe
3. Click OK to save this change

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Status Ready Help

Thread List For Record DEV4 [Go To Home Page](#) | [Go To Last Query Results](#) | 2 Threads

OK Start New Thread

Last Visit: 05/12/2009 12:26:47 PM

Thread	Status	Started By	Messages	Last Update	Subscribe	Delete
Specification Review		Process Manager	1	05/12/2009 12:25:26 PM	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Testing	UPDATED	QA Manager	6	05/12/2009 12:19:19 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK Start New Thread

To unsubscribe from a discussion thread:

1. Click on the Discuss icon in the top button bar and enter the appropriate record number
2. Uncheck the box in the Subscribe column for the thread from which you want to unsubscribe
3. Click OK to save this change

After unsubscribing from a discussion thread, you will no longer receive notification messages related to that thread. You can still access a discussion

thread even if you are not subscribed to it.

Editing a Subscriber List

You can modify the list of users and user groups subscribed to a discussion thread. To do this:

1. Go to the Discussion section of a record by clicking on Discuss icon in the top button bar and entering the record number or by clicking on the Discuss icon for a record on the Query or Home page.
2. Click on a thread to view its contents
3. Click on the Edit Subscriber List button at the top of the page
4. To add a user or group to the Subscribed list, click on the user or group in the right column Not Subscribed, then click on the Add button.
5. To remove a user or group from the Subscribed list, click on the user or group in the left column Subscribed, then click on the Remove button.
6. Click OK to return to the thread's message list.

Any users in the Subscribed list that have "*" noted are users which manually subscribed to the thread by checking the Subscribe box on the Thread List or on the Message List pages.

Edit Subscriber List for Record 4, Thread "Secondary Testing"

Subscribed	Not Subscribed
[Developers] [QA] Process Manager(*)	[Admins] [Managers] [RestrictedUsers] [Users] Admin Build Manager Developer One Development Manager QA Manager QA One
	<input type="button" value="Remove »"/>
	<input type="button" value="« Add"/>

Note: Users marked with (*) subscribed / unsubscribed individually at Thread List page or Message List page.

Initiating a Discussion

With sufficient user group privileges, you can start a discussion within a record. One way to start a discussion is on the Add page when creating a new record. The other way is to go to the Discussion section for a record.

Starting a Discussion via the Add page

To start a discussion when adding a record, enter the information in the fields on the Add form, then check the Start Discussion box at the bottom, then click on the Add or Add & Copy button. On the next page, enter the following information about the discussion thread you are creating:

- **Subject**
Enter some information to describe the topic of the new thread you are creating
- **Message**
Enter information that will appear in the first message posted to this thread. For example, you could describe in more detail the topic of the thread. You could also describe what contributions are expected from the users who participate in the discussion.
- **Invite Users or Groups to Discussion**
By default, when you initiate a discussion, you are subscribed to the discussion thread you are creating. You can unsubscribe yourself, by clicking on your User ID in the Invite Users or Groups to Discussion field so that your User ID is de-selected. Click on the users and / or user groups that should be invited to participate in the discussion thread you are creating. To select multiple users or groups, hold down the CTRL button on your keyboard while clicking on the users and groups. Users have the option to set their [Preferences](#) such that they will receive an email when they are invited to participate in a new discussion thread.

After entering the information above, click OK to create the new thread.

Starting a Discussion for a record after it has been added

To create a thread, click on the Discuss icon in the top button bar, then enter the number of the record for which you want to start a discussion and click OK.

If the record does not have any existing discussion threads, you will be prompted to enter the following information. If the record already has existing threads, you can add a new thread by clicking on the Start New Thread button, then entering the information below:

- **Subject**
Enter some information to describe the topic of the new thread you are creating
- **Message**
Enter information that will appear in the first message posted to this thread. For example, you could describe in more detail the topic of the thread. You could also describe what contributions are expected from the users who participate in the discussion.
- **Invite Users or Groups to Discussion**
Click on the users and / or user groups that should be invited to participate in the discussion thread you are creating. To select multiple users or groups, hold down the CTRL button on your keyboard while clicking on the users and groups. Users have the option to set their [Preferences](#) such that they will receive an email when they are invited to participate in a new discussion thread.

After entering the information above, click OK to create the new thread.

Viewing a Thread

When one or more threads have been created in a record, they will appear on the Thread List. To get to the thread list for a record, click on the Discuss icon in the top button bar and enter the number of the record you wish to see. You can also click on the Discuss icon next to a record from the reports on the Home or Query pages.

The Thread List for a record shows details about each thread such as the name of the thread, the user who started it, the number of messages, and the date and time of the last update. To view a thread, click on the name of a thread on the list.

If a thread has been updated since your last login, UPDATED will appear in the Status column of the thread list. This indicates that there are new message(s) to view in the thread.

Thread Structure and Operations

When viewing a thread, the top of the page will display the thread information. Below the thread information, a tree structure is displayed which lists all messages in the thread. The first entry in the tree structure is the thread information. Click on the subject of a message in the tree structure so its contents will be displayed at the top of the page. To change the number of lines of text you wish to see when first displaying a message, set the [Message Display Window](#) option in the Preferences page. Click on the "+" icon in the top left corner of the message contents to expand it to see all of its contents. Click on the "-" to collapse the contents of the field to the original window size.

There are 2 ways to sort the message list. By default, the messages are sorted in thread order, meaning the messages are organized in a tree structure with levels to indicate the hierarchy of each message. In this mode, the thread message is at the top level. Any reply to this thread message starts a new level (second level). Replies to messages at the second level start a new level (third level) and so on. The other way to sort the message list is in chronological, or time order. To change the sorting order, click on the order icon in the upper right corner of the message box. The image below displays a message list sorted in thread order.

Subject	Status	User	Posted
Secondary Testing		QA Manager	05/07/2009 03:39:33 PM
Re: Secondary Testing		QA One	05/07/2009 03:40:56 PM
Re: Secondary Testing		Developer One	05/07/2009 03:43:55 PM
Newly created Test Scripts	NEW	QA Manager	05/12/2009 12:17:24 PM
Re: Newly created Test Scripts	REPLY	QA One	05/12/2009 12:19:19 PM
Overall Testing Plan	NEW	QA Manager	05/12/2009 12:18:33 PM

When the thread order icon is displayed in the upper right corner of the message box, the message list is currently sorted in time order. Click on this icon to change the message list sort order to thread order.

When the time order icon is displayed in the upper right corner of the message box, the message list is currently sorted in thread order. Click on this icon to change the message list sort order to time order.

When viewing a message in the tree structure, you can use the up and down arrows in the upper right corner of the message to navigate through the tree structure.


If you have the appropriate privileges, you can view, edit, post, reply, or delete a thread and the messages it contains. The thread is the first message listed in the tree structure. If NEW is displayed in the Status column of a message on the list, this indicates that you have not viewed that message.


To reply to the thread, click on the reply icon in the upper right corner of the thread message box at the top. A reply to the thread is a message. The message you create with your reply will be listed one level under the thread in the tree structure. The message is indented to the right to show that it is at the next lower level to the thread. REPLY will be displayed in the Status column of your reply message in the message list.


To reply to the thread with the original thread information included, click on the reply with original thread icon in the upper right corner of the thread message box at the top. The content of the thread will appear in the Message section preceded by "<User Name> wrote:". Type your reply above the original thread content. The message you create with your reply will be listed one level under the thread in the tree structure. The message is indented to the right to show that it is at the next lower level to the thread. REPLY will be displayed in the Status column of your reply message in the message list.


To edit the thread, click on the edit icon in the upper right corner of the thread message box at the top.

When a message is viewed (by clicking on the message in the tree structure), the message content is displayed in the message box at the top.

 To reply to a message, click on the reply icon in the upper right corner of the message box at the top. The message you create with your reply will be listed one level under the message to which you replied. The message is indented to the right to show that it is at the next lower level to the message (and two levels below the thread). REPLY will be displayed in the Status column of your reply message in the message list.

 To reply to a message with the original message content included, click on the reply with original message icon in the upper right corner of the message box at the top. The content of the original message will appear in the Message section preceded by "<User Name> wrote:". Type your reply above the original message content. The message you create with your reply will be listed one level under the message to which you replied. The message is indented to the right to show that it is at the next lower level to the message (and two levels below the thread). REPLY will be displayed in the Status column of your reply message in the message list.


 To edit the message, click on the edit icon in the upper right corner of the message box at the top.

 To delete the message, click on the delete icon in the upper right corner of the message box at the top.


Discussion Information in Reports

The reports displayed on the Query and Home pages in Tracker can display the following icons related to discussions within a record.

 If you have the appropriate privilege, you can click on this icon to view the discussion threads in a record in the query results.

 If you have the appropriate privilege, you can click on this icon to view the discussion threads with new messages posted in a record in the query results.

You can also include whether a record contains a discussion to which you are subscribed as criteria in a saved query. The field Discussion Subscription on the Query page has "*", "Yes", and "No" as options. Selecting "Yes" will include records which contain discussion threads to which you are subscribed in the query results. Selecting "No" will exclude such records.

 The Query page is the section where reports can be generated. You can generate ad-hoc reports, create and run saved reports, create report layouts to choose which fields will be displayed in report results as well as print, export and edit the report results.

The Query page has several sections, each section operates independently of the others (except for the Preview button in the Saved Queries bar which can be used on both saved and advanced saved queries):

- Saved Queries bar - This allows you to create, edit and run saved reports. The functions of the Saved Queries bar are described in the [Using Saved Queries & Reports](#) section.
- Report Layouts bar - This allows you to create and edit saved report layouts. The function of the Reports Layouts bar are also described in the [Using Saved Queries & Reports](#) section.
- Query for Records section - This is where you can create and run ad-hoc reports. This Help section describes the functions of the Query for Records section.
- Advanced Query section - The area where you can create, edit and run more complex saved reports. Advanced Query features are described in the [Advanced Query](#) section.

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Version 6.6.0

Status Query Records - Ready Help

Saved Queries Default [Users] Preview Run Edit Add Delete Set as Default

Report Layouts Default [Users] Edit Add Delete

Query For Records

Run Query Clear Reset

Report Title

Report Layout Home Report2 [Users]

Project Knowledge Base Product Development

Form Article Customer

Search for in PRN Title Product
using Any Word

PRN *

Title

Product *

Platform *

Reported In Version * . * . * . *

Request Type * Severity *

Description

Reported By *

Date Reported on or after and before
 within the previous hours

Workaround

Related Development Tickets *

Status *

Substatus *

Assigned To *

To run an ad-hoc query:

1. Click on the Query icon in the top button bar
2. Click on the Clear button in Query for Records section to clear out any previously selected query criteria
3. If you wish to have a title displayed for this report on the Query Results Page, enter a title in the Report Title field
4. Select a report layout in the Report Layout pulldown displayed in the Query dialog section (below the Run Query button). The report layout selected determines the fields that will be used in the columns of the report displaying the results of the query.
5. Select criteria for the ad-hoc query. You can combine any or all of the fields displayed to define a query. Each value is applied to the query as an AND clause, that is, the query will return all records that match all of the specified criteria. Review the [Selecting Query Criteria by Field Type](#) section for details about how to select criteria in the different field types as part of the ad-hoc query.
6. Below the fields where query criteria can be selected, you can use the Sort By and Sort Order options to select which fields to sort by, and choose Ascending or Descending as the sort order for the query results. Link and TextArea type fields cannot be selected for the Sort By options. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is selected in the Sort By section, the query results will be sorted by the time in each record even though the results will not include the time information. When PRN (Record ID) is selected for one of

the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".

7. Click on the Run Query button to run the query
8. The records that matched the query criteria will be displayed. More detail on the results can be found in the [Query Results](#) section.

The Clear button in the Query for Records section can also be used to set the criteria such that the query will return all records. To run a query that returns all records:

1. Click on the Query icon in the top button bar
2. Click on the Clear button
3. Click on the Run Query button
4. The results page will display all records

A Reset button is available in the Query for Records section, allowing you to restore each query field to the values which were used in the last query that was run. This function is useful if you wish to use a previously executed query as a baseline for further queries.

Selecting Query Criteria by Field Type

Query criteria is entered or selected differently for the various field types available in Tracker.


Project

This field is only available if you have been given visibility to more than 1 project in Tracker. You can limit the query criteria to only those records that belong to a particular project(s) or select * to match any project. The selection made in this field will determine the options available in the Form field. To select multiple projects, hold down the Ctrl button on your keyboard while clicking on the projects to select them.

Form

This field is only available if you have been given visibility to more than 1 form in Tracker. You can limit the query criteria to only those records that were submitted using a particular form(s) or select * to match any form. The selection made in this field determines which fields are available for selecting query criteria. To select multiple forms, hold down the Ctrl button on your keyboard while clicking on the desired forms to select them. If you have selected one or more forms, a Get Fields button will be displayed. Click on the Get Fields button to refresh the page with the fields that belong to the forms you have selected.

Assigned To

You can select any active user or user group within the system or select * to match any user. User groups are denoted as [user group] within the pulldown. To select multiple users or user groups, click on the  to expand the pulldown for multiple selection, hold down the Ctrl button on your keyboard while clicking on the users or users groups to select them. You can also search for a key word or phrase in the Assignee field by using the [Full Text Search](#) option.

Clone

You can select "Yes" to match only records that are clones of other records, or select "No" to match only records that are not clones of other records, or select * to match any records irrespective of whether it is a clone.

Date

Select a start date in the On or After field and, if desired, an end date in the AND Before field for the date period you wish to match. To match any value, leave the field blank. You can either type in the date(s) or click on the calendar icon to select a date. In the calendar, click on the < or > to move backward or forward one month. Click on the << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in red are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss the calendar without saving changes.

Another option is to search within a relative date range (e.g. all records reported within the last 2 weeks or all records with a Due Date in the next 3 days). Select the radio button to the left of the option called within the, select "previous" or "next", enter an integer to specify how many increments of time to include in the range and select the time increment desired (days, weeks, months or years). The results will be returned using the current date and time as the reference point. For example, if you run a query on June 15, 2006 12:20:00 PM that will return all records reported in the previous 2 days, the results will include all records that have a Date Reported between June 13, 2006 12:20:00 PM and June 15, 2006 12:20:00 PM.

Deleted

You can select "No" to include only records that are not marked as deleted, or select "Yes" to match only records that are marked as deleted, or select * to match any records irrespective of whether it is marked deleted.

Discussion Subscription

You can select "Yes" to return records that contain a discussion thread to which you are subscribed, or select "No" to return records that do not contain a discussion thread to which you are subscribed, or select * to return any records irrespective of whether it contains a discussion thread to which you are subscribed.

Float (Floating Point Number)

You can specify a value and one of the following conditions: <, <=, >, >= and =. To match any value, select the condition * and leave the value blank. You can also search for a numeric value or phrase in multiple Float fields by using the [Full Text Search](#) option.

Integer

You can specify a value and one of the following conditions: <, <=, >, >= and =. To match any value, select the condition * and leave the value blank. You can also search for a numeric value or phrase in multiple Integer fields by using the [Full Text Search](#) option.

Link

You can specify one of the following conditions and its associated search criteria:

- Select the * condition to match any value.
- contains: This will return any record where the [key fields](#) of the linked item contains the string that is typed into blank field.
- is one of: This will return any record that is linked to the selected item(s). To select the linked item criteria, click the Set button. A list of items that can be added will be displayed (if you are using a browser other than Internet Explorer, the list will not be displayed until you click on the Find button). To search for items using a text or numeric string, type the string into the Search Criteria field and click on the Find button. Any items that matched your string will be displayed. The string is searched within the [key fields](#) for the forms you are searching. When a Release Number field (a field that contains 4 connected values, e.g. "1.2.1.Beta 1") is a key field, only basic searches for the sub-components of the field (for example, entering "1" to find records with "1.2.1.Beta 1") can be done. Searching for a whole value, like say "1.2.1.Beta 1" is not available.

To select an item in the list, click on the item. To select multiple items, hold down the Ctrl button on your keyboard while clicking on the items to be added. Click on the Add button to add the selected items to the search criteria. To remove an item, click on the item, then click on the Remove button.

- matches: This will return any record that is linked to any of the items in the selected [saved query](#).

PRN

You can specify a value and one of the following conditions: <, <=, >, >= and =. To match any value, select the condition * and leave the value blank. When entering criteria into the PRN field, enter only an integer (don't include the short name of the PRN). For example, if you are trying to locate the record "SUP205", enter "205" into the PRN field. However, unless you make specific selections in the Project and Form fields, this will return any records from other forms that have 205 as part of the PRN (e.g. BUG205, CUS205, etc.). You can also search for a numeric value or phrase in the PRN field by using the [Full Text Search](#) option. In in the Full Text Search box, you must enter the short name (if applicable) to return a specific PRN.

Pulldown

You can pick any particular value, or select * to match any value. To select multiple values within the pulldown, click on the "☒" to expand the pulldown for multiple selection, hold down the Ctrl button on your keyboard while clicking on the values to select them.

When a pulldown is configured as a "Search Pulldown", a Set button will be available to the right of the field. Select * to match any value. Or, to search for values to be included in the criteria, click on the Set button. Type in key word(s) and click on the Find button. Any option menu items that matched your key word(s) will be displayed. To add one of the items in the search results to the pulldown, click on the item, then click on the Add button. To add multiple items, hold down the Ctrl button on your keyboard as you click on the items, then click on the Add button. Any of the items you add can be used as part of the search criteria for an ad-hoc or saved query. Additional items can be added at any time by clicking on the Set button. To remove items, click on the item (or hold down the Ctrl button on your keyboard and select multiple items), then click on the Remove button.

You can also search for a key word or phrase in multiple Pulldown fields, use the [Full Text Search](#) option.

Release Number

You can pick any particular value, or select * to match any value in each of the 4 values for Release Number type fields.

Reported By

You can select any user or user group within the system or select * to match any user. User groups are denoted as [user group] within the pulldown. To select multiple users or user groups, click on the "☒" to expand the pulldown for multiple selection, hold down the Ctrl button on your keyboard while clicking on the users or user groups to select them. If you wish to search for a key word or phrase in the Reported By field, use the [Full Text Search](#) option.

Status

You can select any currently defined workflow state, or a State Group or select * to match any value. To select multiple states, click on the "☒" to expand the pulldown for multiple selection, hold down the Ctrl button on your keyboard while clicking on the states to select them. State Groups allow you to define collections of states to query against. State Groups are denoted as [state group] within the pulldown. For example, your Administrator could define a State Group named "Active" that includes all the states except for "Closed". Check with your Tracker Administrator for information about state groups that have been created in your workgroup. If you wish to search for a key word or phrase in the Status field, use the [Full Text Search](#) option.

Text or TextArea

You can enter a key word or phrase you wish to match in a Text or TextArea type field or leave blank to match any value. If you wish to search for a key word or phrase in multiple Text or TextArea fields, use the [Full Text Search](#) option.

URL

You can enter a key word or string you wish to match in a URL type field or leave blank to match any value. If you wish to search for a key word or phrase in multiple URL fields, use the [Full Text Search](#) option.

YesNo

You can pick "Yes" or "No" or select * to match any value.

Full Text Search

A Full Text Search option is available in the sub-section called Search (below the Report Layout field) when running ad-hoc queries. To include a full text search as part of your query criteria, enter a key word(s) or phrase into the for text box. Float, Integer, PRN, Pulldown, URL, Text and TextArea type fields will be displayed in the in field. Also included are the system fields Assigned To, Reported By and Status. Select the fields that you want to include

in the search for your key word(s) or phrase. Select the search method you wish to use in the using field. Search Methods

- All Words: The search will return all records which contain all of the words typed into the "Search Words" field.
- Any Word: The search will return all records which contain any of the words typed into the "Search Words" field.
- Exact Phrase: The search will return all records which contain the exact match for the string typed into the "Search Words" field.
- Boolean Expression: You can allow the use of Boolean operators such as "AND", "OR" and "NOT". A + sign can be used as "AND". You can also use quotes to distinguish a string of words as one part of the Boolean expression.

Search Method Examples

Key Word(s) or Phrase entered in Search For field	Search Method	Results
access denied	Any Word	The search will return all records which contain the word "access" OR the word "denied".
access denied	All Words	The search will return all records which contain both "access" AND "denied".
access denied	Exact Phrase	The search will return all records which contain the string "access denied".
access OR denied	Boolean Expression	The search will return all records which contain the word "access" OR the word "denied".
access AND denied	Boolean Expression	The search will return all records which contain the word "access" AND the word "denied".
access + denied	Boolean Expression	The search will return all records which contain the word "access" AND the word "denied".
access NOT denied	Boolean Expression	The search will return all records which contain the word "access" but NOT the word "denied".

Dependent Pulldowns

In some cases, your Tracker Administrator may have configured dependent pulldowns in the system. A set of dependent pulldowns is a pair of pulldown menus where one pulldown is the child pulldown field and the other is the parent pulldown field. The option menu items that are displayed in the child pulldown field are determined by the option menu item that is selected for the parent pulldown field. A simple example to illustrate this functionality:

A system has a pulldown called Product with two option menu items "Our Computer" and "Our Printer". A pulldown called Component has the option menu items "Hard Drive", "Video Card", "Toner", and "Paper Tray". The components "Hard Drive" and "Video Card" correspond to the "Our Computer" option menu item in the Product pulldown field. The components "Toner" and "Paper Tray" correspond to the "Our Printer" option menu item in the Product field. When a user selects "Our Computer" for the Product field, only the options "Hard Drive" and "Video Card" will be displayed in the Component field. The Component pulldown (child) is dependent on the Product pulldown (parent).

By default, these relationships between pulldown fields are not enforced when running queries. If you would like these dependencies between pulldown fields to be enforced when you perform queries (including the queries that display your home page reports), change the setting Enforce Dependency in Query Page to be set to Yes in the [Preferences](#) section. To do this,

1. Login to the [workgroup](#)
2. On the Home Page, click on the Preferences link
3. Scroll down to the "Query Page Pulldown Settings" section. Check the box for the setting Enforce Dependencies
4. Click OK to save this change.

In some cases, not all of the pulldown fields involved in the dependency chain will be visible on the Query Page. For example, let's say we have the following dependency chain configured:

Pulldown A > Pulldown B > Pulldown C

If Pulldown B is not visible on the Query Page while the "Enforce Dependency in Query Page" option is enabled, Pulldown C will show all possible menu items instead of only those menu items associated with the selection made in Pulldown A.

Obsolete Items

In some cases, your Tracker Administrator may mark some option menu items as obsolete. An obsolete option menu item is a value in a pulldown field that cannot be selected for new records, but may be contained in existing records. When running queries, you may wish to search using obsolete items. If you would like for obsolete option menu items to be available to be used as part of search criteria on the Query Page:

1. Login to the [workgroup](#)
2. On the Home Page, click on the Preferences link
3. Scroll down to the "Query Page Pulldown Settings" section. Check the box for the setting Include Obsolete Items

- Click OK to save this change.

Examples of Queries

Goal	Procedure
Find all records assigned to "Robert Frank".	Click on the Clear button. Set the "Assigned To" field to "Robert Frank" and click on the Run Query button.
Find all records for the product "Big Widget" that need to be assigned for testing.	Click on the Clear button. Set the "Product" field to "Big Widget" and the "Status" field to "Fixed" and click on the Run Query button.
Locate a record related to random program crashes.	Click on the Clear button. Enter "random crash" in the "Description" field and click on the Run Query button.
Locate all records with the word "print" in the Description.	Click on the Clear button. Enter "print" in the "Description" field and click on the Run Query button.

Query Results

Once you have run a query, you can view, task, edit or view discussion threads to which you are subscribed for any of the records listed in the query results. You can change the sort order of the Query results at any time by clicking on the field name of the column you wish to sort by. The initial sort order is based on the selections made in the Sort By options of the Query for Records section or in the saved query. The field that is being used as the primary sort field will have an arrow to the right of the field name. If the arrow is pointing down, the results are sorted by that field in a descending order. If the arrow is pointing up, the results are sorted by that field in an ascending order. Clicking once on the field with the arrow will reverse the sort order. Clicking once on any field that does not have the arrow will sort the results in ascending order by that field. Any field except Link and TextArea type fields can be clicked to sort the results by that field.

Please note:

- When the preference [Exclude Time From Reports](#) is enabled and a Date field is selected in the Sort By section, the report results will be sorted by the time in each record even though the report will not display the time information
- When PRN (Record ID) is selected for one of the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".
- When a Release Number type field is selected for one of the Sort By fields, the records will be ordered by the actual values of the option menu items in the field (not by the order property set for each option menu item by the Tracker Administrator)
- If records from multiple forms are included in the search results and are sorted by a field that is not common to both forms, records that do not have a value for the sort field will be listed first when sorting in ascending order.

Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help Powered by NetResults Tracker Version 6.6.0

Status 12 records matched the current query Help

Query Results OK Text Print Preview Print Export Edit Records Delete Records

Search... Page 1 of 1

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type
SUP1		Our Browser	When I install the browser, I get incompatible OS error	TBD	Closed	03/27/2007 09:44:18 AM	None.None.None.None	Bug
SUP2		Our Paint Program	Add a custom color selector	Support Engineer One	In Process	03/27/2007 09:58:48 AM	4.2.None.None	Enhancement
SUP3		Our Database	Missing operator error happens when I create a new form	TBD	Closed	03/27/2007 10:06:02 AM	2.3.2.None	Bug
SUP4		Our Spreadsheet	Add a print wizard	TBD	Closed	03/27/2007 10:06:31 AM	3.1.5.None	Enhancement
SUP5		Our Database	Access denied error happens when we try to login	Support Engineer One	In Process	03/27/2007 10:07:14 AM	2.3.None.None	Bug
SUP6		Our Database	Import failing with duplicate table error	Support Manager	Escalated	03/27/2007 10:07:44 AM	2.3.None.None	Bug
SUP7		Our Paint Program	Can't save custom toolbar	TBD	Escalated	03/27/2007 10:08:06 AM	4.1.None.None	Bug
SUP8		Our Browser	Support additional image types	TBD	Closed	03/27/2007 10:08:36 AM	1.5.None.None	Enhancement
SUP9		Our Database	Can't print from new form	TBD	Reported	03/27/2007 10:10:00 AM	2.3.None.None	Bug
SUP18		Our Browser	History is missing recent entries	TBD	Closed	03/27/2007 11:55:18 AM	1.5.None.None	Bug
SUP19		Our Browser	Save history for more than 20 days	TBD	Reported	03/27/2007 12:30:15 PM	1.5.1.None	Enhancement
SUP20		Unknown	Warning: Page Expired error when clicking on the Back button	Support Engineer One	In Process	03/27/2007 01:15:09 PM	None.None.None.None	Unknown

Page 1 of 1

The number of query results displayed per page is based on the value of the field Maximum Records in the Report Settings section of your [Preferences](#) page. By default, this is set to display 20 records per page.

Use the next page and previous page icons to navigate through the query results or use the page pulldown to go directly to a specific page number.

When the "Assigned To" or "Reported By" fields are displayed in the query results and if you have the privilege that allows you to see user profile information, you can click on the user's name to display their profile details as shown below.

User Information - Development, Support, KB Tracker (...)

Full Name	Developer One
Company	Our Company
Email	dev_one@email.com
Phone	650-555-1212
Fax	650-555-1214
Address	1234 Technology Drive
City	Our Town
State / Province	CA
Zip / Pincode	94348
Country	USA
Comment	

If you have the appropriate privilege, you can click on this icon to view a record in the query results.



✓ If you have the appropriate privilege, you can click on this icon to task a record in the query results.



If you have the appropriate privilege, you can click on this icon to edit the fields, attachments or source code list in a record in the query results.



If you have the appropriate privilege, you can click on this icon to view the discussion threads to which you are subscribed within a record in the query results.



If you have the appropriate privilege, you can click on this icon to view the discussion threads to which you are subscribed with new messages posted within a record in the query results.

The query results can be formatted for printing as a table or text (text will display the full contents of all fields, table format may truncate long fields based on the settings in the Report Layout you used). To print the query results, select "Text" or "Table" and click on the Print link in the upper right corner of the Query Page. If you wish to see a preview before printing, select "Text" or "Table", then click on the Print Preview button. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is displayed in the report layout, the time information will not be included (only the date) when print previewing or printing the query results. If you have performed a [search within the query results](#) or have [applied a filter](#), only the records you see when you click on the Print link will be included.

The query results can be exported to a *.CSV file (comma separated values format) by clicking on the Export link in the upper right corner of the Query Results page. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is displayed in the report layout, the time information will not be included (only the date) when exporting the query results. If you have performed a [search within the query results](#) or have [applied a filter](#), only the records you see when you click on the Export link will be included.

Search Within a Set of Query Results

You can do a text search within the fields displayed in a set of query results using the Search Window available above the results. For example, you may wish to search for any records with "print" in the Title as shown in the sample below.

Powered by NetResults Tracker Version 6.6.0

Status 12 records matched the current query

Query Results

Search: print

Search In: Title

Using: Any Word

PRN	Action	Product	Description	Status	Date	Reported In Version	Request Type
SUP1	✓	Our Browser	When I install incompatible C			2007 18 AM	None.None.None.None Bug
SUP2	✓	Our Paint Program	Add a custom			2007 48 AM	4.2.None.None Enhancement
SUP3	✓	Our Database	Missing operator error happens when I create a new form	TBD	Closed	03/27/2007 10:06:02 AM	2.3.2.None Bug
SUP4	✓	Our Spreadsheet	Add a print wizard	TBD	Closed	03/27/2007 10:06:31 AM	3.1.5.None Enhancement
SUP5	✓	Our Database	Access denied error happens when we try to login	Support Engineer One	In Process	03/27/2007 10:07:14 AM	2.3.None.None Bug
SUP6	✓	Our Database	Import failing with duplicate table error	Support Manager	Escalated	03/27/2007 10:07:44 AM	2.3.None.None Bug
SUP7	✓	Our Paint Program	Can't save custom toolbar	TBD	Escalated	03/27/2007 10:08:06 AM	4.1.None.None Bug
SUP8	✓	Our Browser	Support additional image types	TBD	Closed	03/27/2007 10:08:36 AM	1.5.None.None Enhancement
SUP9	✓	Our Database	Can't print from new form	TBD	Reported	03/27/2007 10:10:00 AM	2.3.None.None Bug
SUP18	✓	Our Browser	History is missing recent entries	TBD	Closed	03/27/2007 11:55:18 AM	1.5.None.None Bug
SUP19	✓	Our Browser	Save history for more than 20 days	TBD	Reported	03/27/2007 12:30:15 PM	1.5.1.None Enhancement
SUP20	✓	Unknown	Warning: Page Expired error when clicking on the Back button	Support Engineer One	In Process	03/27/2007 01:15:09 PM	None.None.None.None Unknown

To search within a set of query results:


1. Enter a key word(s) or phrase into the Search... text box above the query results
2. If desired, click on the dropdown icon to select in which fields you wish to search. Selecting "<All>" will search the available fields for the key word(s) or phrase entered (this is the default selection). Or, choose specific fields to be searched. You can select multiple fields by holding down


the Ctrl button on your keyboard as you make your selections. Date and Link type fields are not available for selection. If you wish to find a subset of the query results based on a Date field, you can use the [range filtering option](#).

When searching for a specific PRN, you must enter the full PRN including the short name, if applicable. For example, if you are trying to find the ticket SUP20, entering only "20" will not return this record. You must enter "SUP20" into the Search text box.

When choosing a Release Number field to search within, the value you enter into the Search text box will be searched within each individual digit of the Release Number field. For example, you can search using values like "1", "Beta 2", etc. Basically, you can search for the items that are configured as choices in the Release Number field. However, you cannot search for a combination of multiple digits at once. For example, if you enter "1.2" into the Search text box in an attempt to find records that have values like "1.2.0.None", "1.2.0.Beta 1", "1.2.1.-", you will get 0 matches because it will search for the value "1.2" within each individual digit of the Release Number.

You can choose one of the available search methods: "Any Word" (default selection), "All Words", "Exact Phrase", "Boolean Expression". An explanation of each of these methods is available in the [Full Text Search](#) section.


3. Click on the  Search icon to run the search. Any matches will be displayed.

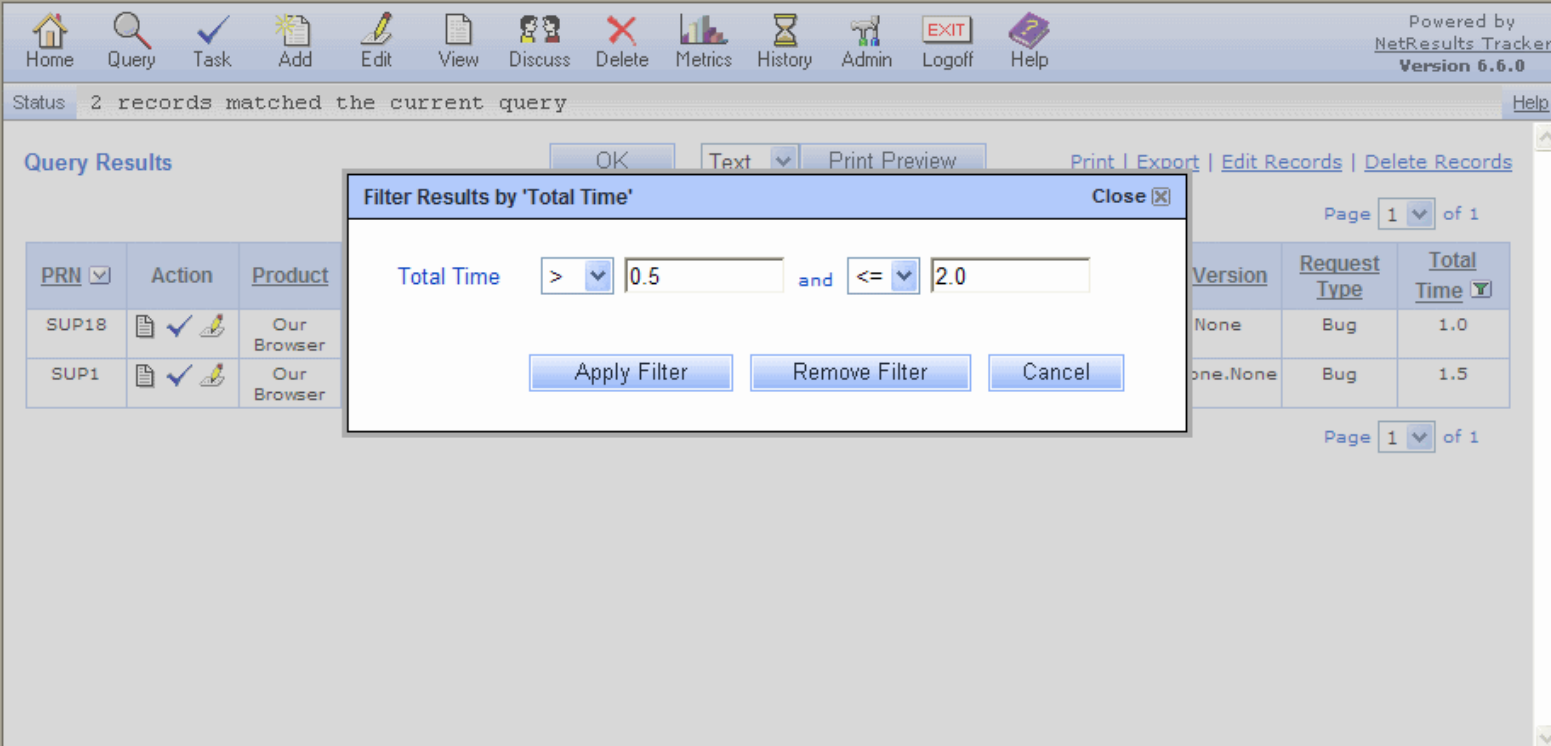
You can click on the  remove icon to remove the search criteria and reset to the defaults (no key word(s) or phrase in Search text box, "<All>" selected, Search method is "Any Word"). This will display the original set of query results.

If you choose to run another search while a subset of the query results is displayed, the new search will be done against the entire set of original query results. For example, if a query returns 12 matches and you run a text search that returns 5 matches. If you run another search while those 5 matches are displayed, the new search will search against the original 12 matches (not only within the 5 that matched your last search).

If you have applied any [filters](#), the excluded items will not be included in the results of any searches done within the query results.

Apply a Range Filter to a Set of Query Results

 Range Filters can be applied to show a subset of the query results. Range Filters are available for Date, Floating Point and Integer type fields. For example, you may wish to see records that were reported within the last week or records that fall into a certain date range. Or, you may wish to see records that have a value that is greater than or less than a certain value in Floating Point or Integer fields. In the sample below, a filter is being applied to show only the records which have a value greater than 0.5 and less than or equal to 2.0 in a Floating point field.





The screenshot shows the NetResults Tracker interface. At the top, there is a navigation bar with icons for Home, Query, Task, Add, Edit, View, Discuss, Delete, Metrics, History, Admin, Logoff, and Help. The status bar indicates "2 records matched the current query". The main content area shows "Query Results" with a table of records. A dialog box titled "Filter Results by 'Total Time'" is open, allowing the user to filter records based on the "Total Time" field. The dialog shows the condition: "Total Time > 0.5 and <= 2.0". Below the dialog, there are buttons for "Apply Filter", "Remove Filter", and "Cancel".

PRN	Action	Product
SUP18		Our Browser
SUP1		Our Browser

Version	Request Type	Total Time
None	Bug	1.0
one.None	Bug	1.5


To apply a filter:

1. Click on the  empty filter icon next to the field name in the column heading
2. For Date fields, you can specify a date or a date range in the "on or after" and "and before" fields. A date can be typed in or you can click on the  calendar icon to select a specific date. Or, you can select a date relative to the current date and time using the "within the" option.

For Floating point and Integer fields, you can select one of the conditions (<, <=, >, >= and =) and enter a value. You can also specify a range by selecting another condition and entering a value in the "and" option.

3. Click on the Apply Filter button. The query results will be refreshed to display the items that matched the filter conditions.

To remove a filter:

1. Click on the  full filter icon next to the field name in the column heading
2. Click on the Remove Filter button. The query results will be refreshed to reflect the removal of the filter.

Editing or Deleting a Set of Query Results

If you have the appropriate privilege, you may also have the option to edit the set of query results displayed using the Edit Records link in the upper right corner of the Query Results page. The Edit Records option allows you to make changes to all of the records that matched your query in a single edit operation. Please note that using the Edit Records options can make large changes to your database and cannot be undone except by restoring to a backup of your database. As such, it is recommended that you make a backup (or ensure a recent backup is available) of your workgroup database and attachments prior to using this operation.

By default, this option is only available to the Admin user. When using this operation, email notifications are not sent based on the changes that were made to avoid overwhelming the mail server being used by Tracker with a large number of email messages.

To use this operation after running a query, on the page where the query results are displayed, click on the Edit Records link in the upper right corner of the page. The Edit Records link will only be available when one Project and one Form are selected in the query criteria (if you only have access to one Project and one Form, these fields won't be displayed in the criteria and the Edit Records link will be available if you have the appropriate user group privilege). The Edit Records page (also known as the Edit Query Result Set page) will display the fields active in the database. Make changes to the fields you desire, then click OK. Click OK once again to confirm that this will change multiple records and cannot be undone. The image below shows the Edit Records page. If you have performed a [search within the query results](#) or have [applied a filter](#), only the records you see when you click on the Edit Records link will be included.

The Edit Records page allows you to modify each of the active fields depending on their field type. For each of the different field types that are displayed on the page, you can specify how the field are to be modified by the Edit Query Results Set action.

For the Assigned to field, you have option of selecting the following choices below

- <Reporter>
This will assign the record to the original user who reported the issue according to the value of the Reported By field.
- <State Manager>
The records of the result set will be assigned to the State Manager based on the current State of the record or the new State Manager if a new State is also selected. State Managers can be set in the [Form State Managers](#) section.
- <Last Assignee for New State>
When selecting this option, Tracker will examine the Record History to find the last user who was assigned to each record, when the record was in the state specified in the Status Field. For instance, if the New State is "Scheduled", Tracker will look in the record history for each record and find the last entry where this record was in the Scheduled state. The assignee listed in this entry will become the new assignee for this record. If a record in the results set has not passed through the state selected as the New State, the Edit Query Results action will stop and report how many records have been changed. A another edit action will have to be used to change the record since there is not a user who was the Last Assignee
- <Last Assignee for State>
When selecting this option, please select a state in the second pulldown next to the Assigned To. With this option selected, Tracker will examine the Record History to find the last user who was assigned to each record. when the record was in the state specified in the second pulldown. For instance, if the state selected is "Scheduled", Tracker will look in the record history for the record and find the last entry where this record was in the Scheduled state. The assignee listed in this entry will become the new assignee for this record. If the record has not passed through the state selected for this option, the Edit Query Results action will stop and report how many records have been changed. Another edit action will have to be used to change the record since there is not a user who was the Last Assignee.
- A specific user
Any active user with that has proper access to the form or the record.

For Date Fields, you can select either of the following

- Set to Blank
For all the records in the query result set, this will set the specified Date field to a blank value,
- Overwrite Current Value With
When selecting this option, please enter a new date and time value in the field next to the pulldown. With this option selected, the chosen date field in all records of the result set will be set to the specified value.

For Float fields, the change entered must include a decimal point (for example, "0.0") and it can be positive or negative.

For Integer fields, the change entered must be an integer and can be positive or negative.

For Pulldowns and Release Number fields on the Edit Results page, any non-obsolete option menu item can be selected.

For the Status field, you have the option of selecting one of the following choices.

- A specific state
Any state in the Workflow can be selected as the new state for set of records.
- <Previous State>
This option will send each record to the most recent state each record was in prior to its current state. Tracker will examine the Record History to determine the previous state.

For Text, you can select either of the following

- Set to Blank
For all the records in the query result set, the selected field will be set to a blank value.
- Overwrite Current Value With
When selecting this option, please enter a new value for the selected Text field in the corresponding field that appears next to the pulldown. The existing value in these fields will be overwritten with the new value specified.

For TextArea, URL fields, you have option of selecting one of the following choices

- Set to Blank
For all the records in the query result set, the selected field will be set to a blank value.
- Overwrite Current Value With
When selecting this option, please enter a new value(s) in the corresponding field that appears below the pulldown. With this option selected for a TextArea or URL, the existing value in these fields will be overwritten with the new value(s) specified.
- Append to Current Value With

When selecting this option, please enter a new value(s) in the corresponding field that appears below the pulldown. With this option selected for a TextArea or URL, the new value(s) specified will added to the existing value.

For YesNo fields, you can choose to change the value to "Yes" or "No".

The Edit Records operation can also be used to set the Alerts settings for multiple records that matched your query in a single edit operation. If you wish to delete the alerts settings for all records in the query results, select Delete in the Alerts field at the bottom of the page. If you wish to modify the alerts settings for all records in the query results, select Modify... in the Alerts field at the bottom of the page. Please note that the Modify... option will only be available if the query results are limited to those records that belong to a single form. When the results include records from multiple forms, the Modify... option will not be available. When selecting Modify..., another page will be displayed where the alerts settings can be changed. To change a particular

setting, click on the check box next to the setting as shown in the example below. Modify the alerts settings you wish to change, then click OK to save the changes for all records in the query results.

You can change the record visibility for a set of records using the Edit Records operation. A list of user groups will be displayed in the field Make Visible to These User Groups. If a user group(s) is selected during the Edit Records operation, the records in the query results will be set such that they are visible only to the user group(s) selected. To make a set of records visible to only the Admins user group, click on the blank space at the bottom of the list in the Make Visible to These User Groups field. Changing the visibility for a set of records will eliminate the visibility settings previously in effect for these records.

If you have the appropriate privileges and your system has been configured to use "hard" deletes (deletes which permanently purge records from the database), then you may see a Delete Records link in the upper right corner of the query results page. Clicking this link will (after asking for a final confirmation), permanently delete all records that matched the query you just ran. However, entries will be made to Record History for all records deleted in this manner. By default, Tracker is configured to perform only "soft" (recoverable) deletes and only the Administrator is able to perform the Delete Records operation (it requires the same privilege as Edit Records). If you have performed a [search within the query results](#) or have [applied a filter](#), only the records you see when you click on the Delete Records link will be included.

Overview

A Tracker report is composed of the search criteria, which is called a query, and a format for the results (which determines which fields are displayed in the results and other options), which is called a report layout. You can define and save both queries and report layouts. This enables you to quickly select from a list of frequently used queries, rather than re-entering all the query parameters for each query. You can use either group or personal saved queries. You can always save a personal query, and if you have been given permission by your Administrator, you may also be able to save a query or report layout for use by all users in your assigned user group(s).

Saved queries are managed by the Saved Query bar which appears on the Query Page below the status bar, as shown below:



Using the Saved Query bar, you can define new queries, edit or remove existing saved queries, run or preview a saved query and set a default saved query. Group level saved queries are listed followed by the User Group name in square brackets (e.g. "Assigned to Me [Users]" denotes the saved report called "Assigned to Me" is accessible by the user group "Users"). Admin users can access saved queries for all user groups without having to be a member of each group.

Saved report layouts are managed by the Report Layouts bar which also appears on the Query Page below the status bar, as shown below:



Using the Saved Reports bar, you can define new report formats, and edit or remove existing saved report formats. Group level saved report formats are listed followed by the User Group name in square brackets. Admin users can access saved reports for all user groups without having to be a member of each group.

If a user group is not available for selection, you may not be a member of the user group or you may not have sufficient privileges for saving reports or report layouts for that user group. If you are a member of the user group or are logged in as a user with the Admin privilege, the user group may not have visibility to at least one Project and Form. Only user groups that have visibility to at least one Project and Form (configured in the Admin section) will be available for selection when creating group saved queries, advanced queries or report layouts.

Restrictions Related to Adding Saved Queries and Report Layouts

In order to create a saved query or report layout for a user group, a user must have the necessary privileges as defined by your Tracker Administrator. Without these privileges, a user can only create personal saved queries and report layouts.

Depending on the user group privileges that have been assigned to your by your Tracker Administrator, you may only be able to use certain operations on certain saved group reports or report layouts. For example, if you are a member of 2 user groups, but only have privileges to edit group saved reports or report layouts for one of those user groups, some of the operations in the Saved Queries or Report Layouts bar (e.g. "Add", "Edit") may be disabled when selecting a saved query or report layout for a group where you have limited privileges.

Field Visibility in Saved Group Queries and Reports

Field Visibility is the feature that allows fields to be restricted by user group in various areas of Tracker such as the Add, Edit, and View pages and in Queries and Reports. That is to say that the system can be configured such that each user group may see a different set of fields in each area of Tracker. Therefore, when creating saved group queries and report layouts, all fields may not be displayed depending on field visibility settings for the group selected.

When a field is not visible to the user group selected in a saved group query, the field will be set to the default value when the saved group query is run. In most cases, this default value is "", which will include all possible values for the field in the saved group query results. In the case of the Deleted field, the default is "No" such that all records that have not been marked as deleted will be included in the results of the saved group query.

In the case of report layouts, if the field is not visible to the group selected for the saved group report layout, the field will not appear in the list of possible values for each column of the report.

Please contact your Tracker Administrator if you wish to include a field in a saved group query or report layout that is not visible to the selected user group.

Saved Queries and Report Layouts using Multiple Forms

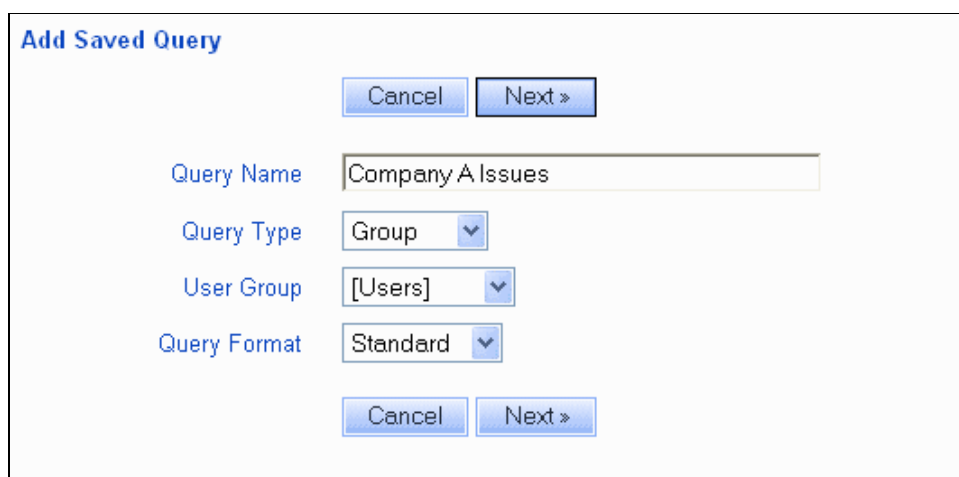
Saved Queries and Report Layouts with multiple forms selected can have fields selected in the criteria that are not available in all forms (the field does not exist in certain forms) or are not visible to all user groups who are able to run that saved query or report layout. When this occurs, the criteria that does not apply to a certain form will not match any records for that form. For example, let's say there are 2 forms in a workgroup: Form A and Form B. There is a query with Form = "*" (records that match either Form A or Form B) and "Priority = 1", but Priority is not visible in Form A. Since Priority is not visible in Form A, no records added using Form A will be included in the query results (because there are no records added using Form A that have the Priority field set).

The same is true for report layouts. This means that if a field is not visible or does not exist in a form, no value will be displayed in that field's column for records where the field is not visible or does not exist. Using a similar example the one above for query results (query with Form = "*", which will return records that match either Form A or Form B, Priority is not visible in Form A). The report layout we are using with this query has a column with "Priority" selected. In the query results any records added using Form A will have a blank value in the Priority column.

Add a Saved Query

To add a saved query, follow these steps:

1. Login to the [workgroup](#)
2. Click on the [Query](#) icon in the Button bar
3. Click on the Add button to the right of the Saved Queries pulldown. Note: to create a Saved Query that is similar to an existing Saved Query, select the existing saved query in the pulldown menu to the left before clicking the Add button.



The screenshot shows a dialog box titled "Add Saved Query". It contains the following fields and controls:

- Buttons: "Cancel" and "Next >" (top right)
- Query Name: Text input field containing "Company A Issues"
- Query Type: Dropdown menu with "Group" selected
- User Group: Dropdown menu with "[Users]" selected
- Query Format: Dropdown menu with "Standard" selected
- Buttons: "Cancel" and "Next >" (bottom right)

4. Enter a name for the saved query in the Query Name field (this is the name that you will use to retrieve the query)
5. In the Query Type field, select whether this is a "Personal" (to create a saved query that will be accessible only to you) or "Group" (to create a saved query that will be accessible to members of a particular user group) saved query.
6. If you selected "Group" as the Query Type, select a user group in the User Group field to which this saved query should be visible. You will only be able to select the user groups in which you are a member (however, the Tracker Administrator can add saved queries for any user group).
7. Select "Standard" as the Query Format and click Next to proceed

Add Saved Query

Report Title

Report Layout

Search for in

 using

PRN *

Title

Product *

Platform *

Reported In Version * . * . * . *

Request Type *

Severity *

Description

Reported By

Date Reported
 on or after
 and before

 within the

Email Address

Workaround

Status *

Assigned To *

8. The text in Report Title will be displayed at the top of the Query Results page. By default, the Query Name selected above will be entered as the Report Title. Change the Report Title, if desired.
9. Select a [Report Layout](#) to choose which fields will be displayed in the query results
10. Enter the criteria for the query as you would for an [ad-hoc query](#)
11. In the Sort By section, select the fields and the sort order ("Ascending" or "Descending") that will be used to display the query results. Link and TextArea type fields cannot be selected in the Sort By options.
12. Click on the Add button to save the query

Run a Saved Query

To run a saved query, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Saved Queries pulldown at the top of the page, select the saved query you wish to run
4. Click on the Run button to the right of the Saved Queries pulldown

Preview a Saved Query

Many times you may wish to verify the criteria of a saved query before running it or perhaps modify it slightly before running it. The Tracker saved query Preview feature allows you to do this.

To preview, optionally modify, and run a saved query, follow these steps:

1. Login to the [workgroup](#)

2. Click on the Query icon in the Button bar
3. In the Saved Queries pulldown at the top of the page, select the saved query you wish to preview
4. Click on the Preview button to the right of the Saved Queries pulldown
5. The criteria and other parameters for the saved query appear in the query dialog below. Modify the query [criteria](#) or parameters if desired.
6. Click on the Run Query button in the query dialog to run the query

Select a Default Saved Query in the Saved Queries Pulldown

To set the query which you would like to appear in the Saved Queries pulldown when you first browse to the Query page, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Saved Queries pulldown at the top of the page, select the saved query you wish to save as the default
4. Click on the Set as Default button to the right of the Saved Queries pulldown. The page will be refreshed and the Status will say "Default Query has been updated."

Edit a Saved Query

To edit a saved query, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Saved Queries pulldown at the top of the page, select the saved query you wish to edit
4. Click on the Edit button to the right of the Saved Queries pulldown.
5. A page containing the current query criteria and other parameters is displayed. Edit the query [criteria](#) or parameters as desired.
6. Click on the OK button to save your updates.

Delete a Saved Query

To delete a saved query, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Saved Queries pulldown at the top of the page, select the saved query you wish to delete
4. Click on the Delete button to the right of the Saved Queries pulldown

If a user has the saved query you are attempting to delete selected as one of their default Home Page reports, you will not be able to delete the saved query until another report is selected for the user's default Home Page reports in the [Preferences](#) section.

Standard Saved Queries within Tracker

Within Tracker, there are saved queries that are installed by default. The description of each report below is how the saved queries are set by default, but your Tracker Administrator or another user with the appropriate privileges may have changed the report's settings:

- Default [Users]
A saved query for the Users group that will display all records within Tracker.
- Assigned to Me [Users]
A saved query for the Users group that will display all records assigned to the user who is currently logged into Tracker. By default, this query is selected as the First Home Page Report in the Preferences page for all non-Restricted users. Please review the [Preferences](#) section for more information about selecting a saved query for the First Home Page Report.
- Reported By Me [Users]
A saved query for the Users group that will display all records reported by the user who is currently logged into Tracker. By default, this query is selected as the Second Home Page Report in the Preferences page for all non-Restricted users. Please review the [Preferences](#) section for more information about selecting a saved query for the Second Home Page Report.
- Added By Me [RestrictedUsers]
A saved query for the RestrictedUsers group that will display all records reported by the restricted user who is currently logged into Tracker. By default, this query is selected as the First Home Page Report in the Preferences page for all Restricted users. Please review the [Preferences](#) section for more information about selecting a saved query for the First Home Page Report.

Saved Report Layouts

Report Layouts determine which fields will be displayed in the query results. You can create as many report layouts as desired. Report Layouts

can be created for personal use or for use by user groups. When running an ad-hoc query and when saving queries, you can choose which report layout should be used to display the query results.

To add a report layout, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. Click on the Add button to the right of the Report Layouts pulldown

Add Report Layout

Cancel Next >

Report Layout Name Release Notes

Report Layout Type Group

User Group [Users]

Show Fields in Form <All>

Cancel Next >

4. Select the Report Layout Type. If it's a group report layout, select a group to which this report layout should be visible. You will only be able to select the user groups in which you are a member (however, the Tracker Administrator can add saved report layouts for any user group). Select the form which contains the fields you want to choose from to build the report layout or select "<All>" to list all fields irrespective of the form in the Show Fields in Form field. If you only have access to one form, the Show Fields in Form field will not be available. Click Next to proceed.

Add Report Layout: Release Notes

OK Cancel

Align Text Fields Left

Max Field Size 255

Form <All>

Column 0 PRN

Column 1 Project

Column 2 Title

Column 3 Request Type

Column 4 Reported In Version

Column 5 Fix Detail

Column 6 <Do not use this Column>

Column 7 <Do not use this Column>

Column 8 <Do not use this Column>

Column 9 <Do not use this Column>

Column 10 <Do not use this Column>

5. In the form that appears, enter a report name (this is the name that you will use to select the report layout) in the Report Layout Name field
6. Select how to align text fields (left, center, right)
7. Select the maximum size for text fields
8. Select the fields you would like displayed
9. Click on the OK button

Properties of Fields Selected for Report Layout Columns

Any of the active fields for the form selected (or all if "<All>" was selected) can be selected as columns in a report layout. Some field types have special properties when included in a report layout.

When the Assigned To or Reported By fields appear in a report layout, users with the privilege "View User Information" will be able to click on the user's name in the query results to display the user's profile information (e.g. phone number, email address, company name).

When the preference [Exclude Time From Reports](#) is enabled and a Date field is included in a report layout, only the date information (not the time) will be included in the query results.

Selecting a Link field as a column in a report layout will display the PRNs of any linked records. The PRN for the linked records is a clickable link that will display the View Page of that record.

Selecting <Attachments> as a column in a report layout will display the description of any attachments for the record. The description is a link that can be clicked to view the attachment in a separate browser window.

Selecting <Clone> as a column in a report layout will display "Yes" if a record is a [clone](#) or "No" if a record is not a clone.

Selecting <Parent PRN> as a column in a report layout will display the PRN of the record it was cloned from (the parent record). For records that are not clones, this column will display the value "-1" to signify the record does not have a parent.

Edit a Saved Report Layout

To edit a saved report layout, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Report Layouts pulldown, select the report layout you wish to edit
4. Click on the Edit button to the right of the Report Layouts pulldown
5. A page containing the current layout is displayed. Edit the layout as desired.
6. Click on the OK button to save your updates

Delete a Saved Report Layout

To delete a saved report layout, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. In the Report Layouts pulldown, select the report layout you wish to delete
4. Click on the Delete button to the right of the Report Layouts pulldown

Select a Saved Report Layout in an Ad-hoc Query

To run an ad-hoc query using a particular report layout, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. Enter the query directly or start with an existing saved query by selecting it in the Saved Queries pulldown, then clicking on the Preview button.
4. Select the report layout wish to use in the Report Layout pulldown in the Query dialog section (below the Run Query button)
5. Click on the Run Query button

Associate a Saved Report Layout to a Saved Query

To associate a saved report layout to a saved query, follow these steps:

1. Login to the [workgroup](#)
2. Click on the Query icon in the Button bar
3. Select the saved query in the Saved Queries pulldown, then click on the Edit button to the right of the Saved Queries pulldown.
4. In the Report Layout pulldown, select the desired saved report layout.
5. Click on the OK button to save the change

Standard Saved Report Layouts within Tracker

Within Tracker, there are saved report layouts that are installed by default. The description of each report layout below is how each is set by default, but your Tracker Administrator or another user with the appropriate privileges may have changed the report layout's settings::

- **Default [Users]**
A saved report layout for the Users group that will display the fields PRN, Product, and Status in a report. The saved query Default [Users] uses this report layout by default.
- **Home Report1 [Users]**
A saved report layout for the Users group that will display the fields PRN, Product, Title, Reported By, Status, Request Type, Priority, and Description within a report. By default, this report layout is used by the saved query "Assigned To Me [Users]".
- **Home Report2 [Users]**
A saved report layout for the Users group that will display the fields PRN, Product, Title, Assigned To, Status, Date Reported, Reported in Version, Request Type, and Released in Version within a report. By default, this report layout is used by the saved query "Reported By Me [Users]".
- **Added By Me [RestrictedUsers]**
A saved report for the RestrictedUsers group that will display the fields PRN, Product, Title, Status, and Date Reported within a report. By default, this report layout is used by the saved query "Added By Me [RestrictedUsers]"

Overview

The Advanced Queries function allows you to build more intricate queries using operators such as AND, OR, and NOT, multiple selection of values to match, and grouping (parentheses) of query criteria to generate more refined results. You can define and save advanced queries, enabling you to quickly select from a list of frequently used advanced queries, rather than re-entering the numerous query parameters that compose this type of query. You can use either group or personal advanced queries. You can always save a personal advanced query, and if you have been given permission by your Administrator, you may also be able to save an advanced query for use by all users in a user group.

Advanced queries are managed by the Saved Queries bar which appears on the Query Page below the status bar.

The image shows a horizontal bar with a blue header labeled "Saved Queries". Below the header is a dropdown menu currently displaying "Default [Users]". To the right of the dropdown are six buttons: "Preview", "Run", "Edit", "Add", "Delete", and "Set as Default".

Using the Saved Queries bar, you can define new advanced queries, edit or remove existing advanced queries, and run or preview an advanced query. Group level advanced queries are listed followed by the User Group name in square brackets (e.g. "Assigned to Me [Users]" denotes the saved report called "Assigned to Me" is accessible by the user group "Users"). Admin users can access advanced saved queries for all user groups without having to be a member of each group. If a user group is not available for selection, you may not be a member of the user group. If you are a member of the user group or are logged in as a user with the Admin privilege, the user group may not have visibility to at least one Project and Form. Only user groups that have visibility to at least one Project and Form (configured in the Admin section) will be available for selection when creating group advanced saved queries.

Field Visibility in Advanced Saved Group Queries

Field Visibility is the feature that allows fields to be restricted by user group in various areas of Tracker such as the Add, Edit, and View Pages and in reports on the Query and Home Pages. That is to say that the system can be configured such that each user group may see a different set of fields in each area of Tracker. Therefore, when creating advanced saved group queries, all fields may not be displayed depending on field visibility settings for the group selected.

When a field is not visible to the user group selected in a advanced saved group query, the field will be set to the default value when the advanced saved group query is run. In most cases, this default value is "*", which will include all possible values for the field in the advanced saved group query results. In the case of the Deleted field, the default is "No" such that all records that have not been marked as deleted will be included in the advanced saved group query results.

If a personal or group advanced saved query was created before a field was made invisible to a user group, it is possible for this user group to see an invisible field in a clause in the "Query Phrase" section of the advanced saved query. Any clause containing a field that is now invisible to the user group will be "read only". This clause cannot be edited because it contains a field that has been restricted for the user group. However, the clause can be deleted from the advanced saved query.

Please contact your Tracker administrator if you wish to include a field in an advanced saved group query that is not visible to the selected user group.

Define an Advanced Saved Query

To define an advanced saved query, follow these steps:

1. To start, select a query from the Saved Queries pulldown menu that will be used as the starting point (template) for the new saved query. To start with a basic saved query, select the saved query "Default [Users]".
2. Click on the Add button on the Saved Queries bar

The image shows a dialog box titled "Add Advanced Query". It contains the following fields and controls:

- Buttons: "Cancel" and "Next >" at the top right.
- Query Name: Text input field containing "High Priority (1-2) Issues".
- Query Type: Dropdown menu with "Group" selected.
- User Group: Dropdown menu with "[Users]" selected.
- Query Format: Text field containing "Advanced".
- Buttons: "Cancel" and "Next >" at the bottom right.

- In the form that appears, enter a query name (this is the name that you will use to retrieve the query) in the Query Name field.
- In the Query Type field, select whether this is a "Personal" (to create a saved query that will only be accessible by you) or "Group" (to create a saved query that will be accessible to members of a particular user group) saved query.
- If you selected "Group" for Query Type, select a user group in the User Group field to which this saved query should be visible. You will only be able to select the user groups in which you are a member (However, the Tracker Administrator can add advanced saved queries for all user groups).
- Select "Advanced" as the Query Format and click Next to proceed

Add Advanced Query

Report Title

High Priority (1-2) Issues

Query Phrase

AND
Priority
is one of

None
1
2
3
4

Full Query

```

Status is one of (All)
AND Deleted is one of (No)
AND Priority is one of (1,2)

```

Sort By

Report Layout

Default [Users]

- The text in Report Title will be displayed at the top of the Query Results page. By default, the Query Name selected above will be entered as the Report Title. Change the Report Title, if desired.
- Make a selection in the Project field:
This field is only available if you have been given visibility to more than 1 project in Tracker. You can limit the query criteria to only those records that belong to a particular project(s) or select * to match any project. The selection made in this field will determine the options available in the Form field. To select multiple projects, hold down the Ctrl button on your keyboard while clicking on the projects to select them.
- Make a selection in the Form field:
This field is only available if you have been given visibility to more than 1 form in Tracker. You can limit the query criteria to only those records that were submitted using a particular form(s) or select * to match any form. The selection made in this field determines which fields are available for selecting query criteria. To select multiple forms, hold down the Ctrl button on your keyboard while clicking on the desired forms to select them. If you have selected one or more forms, a Get Fields button will be displayed. Click on the Get Fields button to refresh the page with the fields that belong to the forms you have selected.
- Phrases will be displayed in the Full Query section based on the saved query you selected in the Saved Queries pulldown before clicking

on the Add button. To edit or delete an existing phrase, click on the phrase, then click on the Edit or Delete button above the Full Query section. Build query phrases by making selections in the Query Phrase box according to the information in the [Query Phrases](#) section. If you are creating/editing the first query phrase, "(blank)" must be selected for the first field of the first row of the Query Phrase section.

11. Select values for the rest of the fields in the first row
12. If applicable, enter information in the rows 2, 3, or 4. To select multiple values in row 3, hold down the CTRL button on your keyboard while clicking on each value you wish to select.
13. Click on the Insert button to add the first query phrase or insert a query phrase into the Full Query section
14. Click on the Reset button to clear the Query Phrase section, then construct the next query phrase
15. Repeat the above steps until you have inserted all of the query phrases you wish to include
16. If desired, choose fields and order in the Sort By section to sort the query results. Select which fields to sort by and choose "Ascending" or "Descending" as the sort order for the selected fields for the query results. The Sort By and Sort Order selection are at the bottom of the Advanced Query page. Link and TextArea type fields cannot be selected in the Sort By options. Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is selected in the Sort By section, the query results will be sorted by the time in each record even though the results will not include the time information. When PRN (Record ID) is selected for one of the Sort By fields, the records will be ordered according to the numeric component of the PRN (Record ID) field. The short name of the form will not be used as part of the sorting when PRN (Record ID) is selected. For example, let's say you have PRNs "REC1" and "REC2". The sorting will be done using "1" and "2", ignoring the "REC".
17. If desired, select a report layout in the Report Layout pulldown menu. The report layout selected determines which fields will be displayed as the columns in the query results. More information on Report Layouts can be found in the [Using Saved Queries and Reports](#) section.
18. Click on the Add button to save your advanced query

Run an Advanced Query

To run an advanced query, follow these steps:

1. Click on the pulldown menu in the Saved Queries bar and select the desired advanced query from the list of options
2. Click on the Run button to the right of the Saved Queries pulldown

Building Query Phrases

The procedure for building an advanced query differs from a standard query in that multiple options for each field can be selected and / or excluded for advanced queries. This is done by composing various query phrases that will be combined to generate the query results. These phrases are constructed in the Query Phrase section of the Advanced Query page.

The screenshot displays the 'Query Phrase' and 'Full Query' sections of the Advanced Query page. The 'Query Phrase' section includes a dropdown menu with 'AND' selected, a field with 'PRN' selected, and a comparison operator '>'. Below this is an empty text input field and 'Insert' and 'Reset' buttons. The 'Full Query' section shows a list of query phrases, with 'AND PRN > 5000' selected. Other phrases include 'Status is one of (All)', 'AND Deleted is one of (No)', 'AND Priority is one of (1,2)', and a nested phrase: 'AND { Fix Detail contains print OR Fix Detail contains crash }'. At the bottom are 'Edit' and 'Delete' buttons.

Logic operators and fields are selected for a query phrase in the first row of the Query Phrase section. A description of the fields in the first row of the Query Phrase section:

1. The first field is a pulldown that contains the operators "AND", "OR", and "(blank)". For the first phrase of an advanced query, "(blank)" is the only possible option for this first field.
2. The second field is a pulldown that contains the operators "NOT" and "(blank)".
3. The third field is a pulldown menu that lists all fields within the data record. In addition, "(" and ")" are options in this pulldown that can be used to nest (or group together) query phrases within the full query.

4. The fourth field will automatically change based on the selection that was made for the third field. Table 1 shows the possible values for the fourth field based on the input of the third field:

3rd Field Type	4th Field Displays...	Type of Information to Enter in Input Box...
Assignee	is one of	select a user or [User Group] from menu
Date	"before", "on or after"	date entered in the format that matches the date and time settings in Preferences section (e.g. "mm/dd/yyyy")
Date	"is empty"	N/A
Date	"within the"	Select "previous" or "next", enter an integer for the number of increments desired and select a time increment to search within a date range relative to the current date and time
Deleted	is one of	select Yes or No from menu
Float	<, <=, >, >= and =.	floating point number
Integer	<, <=, >, >= and =.	non-negative whole number
Link	"contains"	text string
Link	"is one of"	enter a text string to search for items, select item(s) from menu
Link	"matches"	select a saved query from menu
PRN	<, <=, >, >= and =.	record number
Product (History Pulldown)	is one of	select value(s) from menu
Pulldown Menu	is one of	select value(s) from menu
RelNum	=	select value from menu for each digit A - D or leave as ""
Reporter	is one of	select a user or [User Group] from menu
Status	is one of	select a State or [State Group] from menu
Text or TextArea Field	"contains"	text string
Text or TextArea Field	"is empty"	N/A
URL	"contains"	text string
URL	"is empty"	N/A
YesNo	is one of	select Yes or No from menu
<Clone>	"is"	true (if record is a clone) or false
<Full Text Search>	"(blank)"	enter a text string in Search for field, select one or more fields in the in field, select a Search Method in the using field. Review Full Text Search for more details.
("(blank)"	N/A
)	"(blank)"	N/A

The selections made in the pulldowns determine what information should be entered into the Input box below the pulldowns. Table 1 describes the type of information that should be entered.

Once the components of the query phrase have been selected, you can click on the Insert button to add the query phrase to the Full Query section. To add another query phrase, click on the Reset button and begin selecting options in the first row.

To edit a query phrase that has been inserted into the Full Query section, click on the query phrase, then click on the Edit button. Modify the phrase in the Query Phrase section, then click on the Update button. The query phrase will be updated in the Full Query section.

To delete a query phrase that has been inserted into the Full Query section, click on the query phrase, then click on the Delete button.

Preview an Advanced Query

Many times you may wish to verify the parameters of an advanced query before running it or perhaps modify it slightly before running it.

To preview, optionally modify, and run an advanced query, follow these steps:

1. Select an advanced query in the Saved Queries pulldown, then click on the Preview button to the right of the Saved Queries pulldown. The parameters for the advanced query appear in the query dialog below.
2. Modify the advanced query parameters if desired
3. Click on the Run Query button in the query dialog to submit the query

Edit an Advanced Query


To edit an advanced query, follow these steps:

1. Select the advanced query you would like to edit in the Saved Queries pulldown, then click on the Edit button to the right of the Saved Queries pulldown. A page containing the current advanced query parameters will be displayed.
2. In the Full Query section, click on a query phrase you wish to modify, make the changes in the Query Phrase section, then click on the Update button. After you are done making changes to the advanced query, click on the OK button to save your updates.


Delete an Advanced Query

To delete an advanced query, follow these steps:

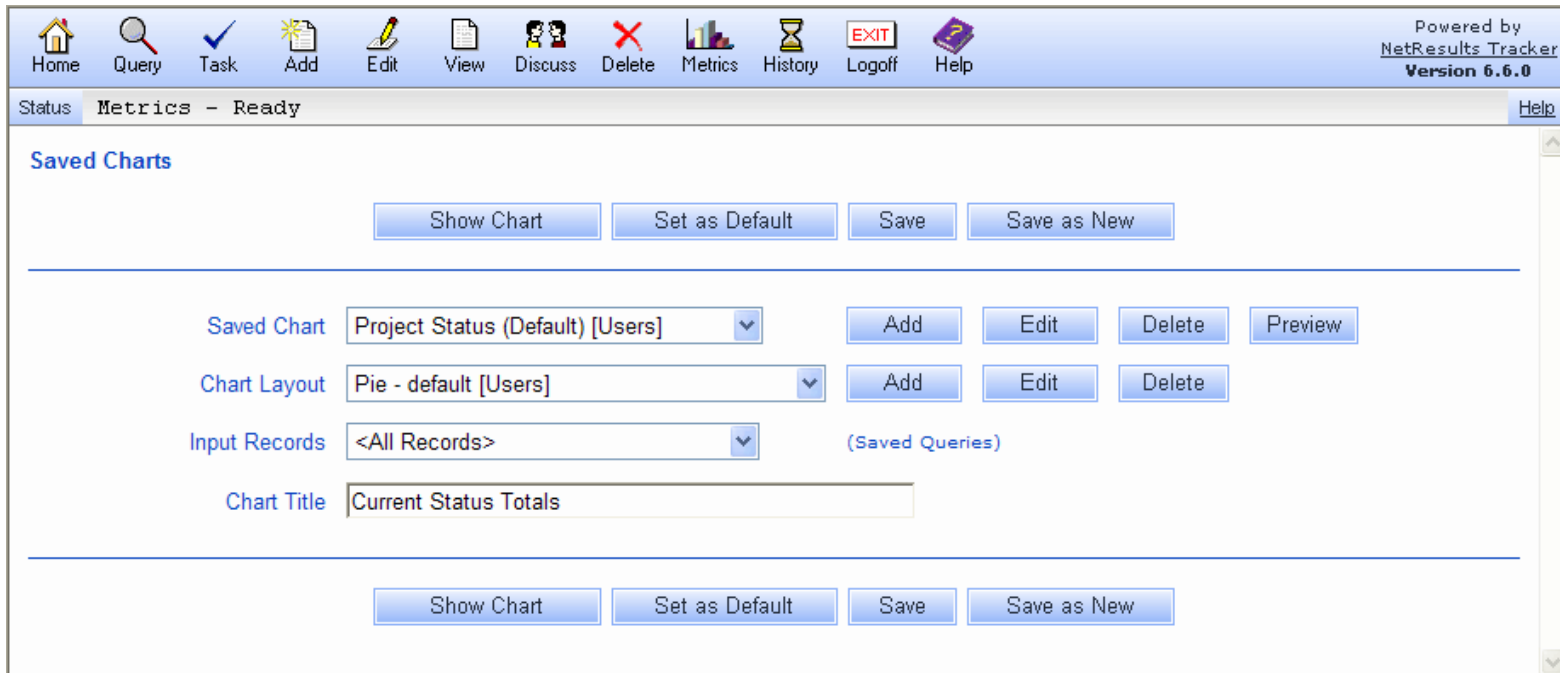
1. Select the advanced query you would like to remove in the Saved Queries pulldown, then click on the Delete button to the right of the Saved Queries pulldown

NetResults Tracker Help 

Metrics Help Topics << >>

 The Metrics operation is a way to gather and display statistical information based on your Tracker data. The information can be displayed as bar, pie, or line charts using system defined or user defined Chart Layouts to specify the format for the chart. You can limit the records used as input to the statistical calculations (Input Records) by specifying a [Saved Query](#). Only those records which match the Saved Query will be used when performing the statistical calculations. Chart parameters can be stored away for future runs as Saved Charts (for global, group, or personal use).

Running a Chart



The screenshot shows the NetResults Tracker interface with the Metrics menu selected. The status bar indicates "Metrics - Ready". The main content area is titled "Saved Charts" and contains the following configuration options:

- Buttons: Show Chart, Set as Default, Save, Save as New
- Saved Chart: Project Status (Default) [Users] (dropdown), Add, Edit, Delete, Preview
- Chart Layout: Pie - default [Users] (dropdown), Add, Edit, Delete
- Input Records: <All Records> (dropdown), (Saved Queries)
- Chart Title: Current Status Totals (text input)
- Buttons: Show Chart, Set as Default, Save, Save as New

A chart can be generated using the "Project Status (Default) [Users]" Saved Chart or any other saved chart that has been added by a Tracker user with the appropriate privilege(s) by performing the following steps:

1. Select a chart from the Saved Chart pulldown field (by default, only the default saved chart "Project Status (Default) [Users]" will appear in this field)
2. The options displayed in the Chart Layout, Input Records, and Chart Title fields will be automatically filled with the settings in the Saved Chart selected. If desired, make other selections for the Chart Layout, Input Records, and Chart Title fields.
3. Click on the Show Chart button to display the chart.
4. Make changes to the formats of the chart displayed by using the Dynamic Chart Layout Options. Details on the options available can be found in the [Chart Layout Options](#) section.
5. To change the parameters used to display the chart, click on the Change Parameters button to return to the Chart Selection page.

Printing a Chart

After generating a chart, you can click on the Print link in the upper right corner of the page to print the chart.

Note: Any changes made to the dynamic chart layout options (such as changing from 2D to 3D chart layout) after you generated it will not be in the printed version.

Exporting Chart Data

After generating a chart, click on the Export link in the upper right corner of the page to export the chart data to a CSV (comma separated values) file. You can then open this file with another tool such as Microsoft Excel or Crystal Reports.

To create a chart in Microsoft Excel from the exported data, "rubber band" (left-click mouse and drag a rectangle around) the data plus column and row titles (exclude rows 1 through 3, but include the individual row/column titles in row 4 and column A along with the data in your selection) and click the Chart Wizard icon (or select Insert->Chart...). Click the Finish button in the Chart Wizard to accept the Microsoft Excel default settings for the chart; or make selections, click on the Next button, then click Finish to create a chart with custom settings. Please review the Microsoft Excel Help for further information on Excel charts.

Chart Notes

After generating a chart, you can click on the Notes link in the upper right corner of the page to see additional information about the format of the chart type being displayed.

Set a Default for the Metrics Page

You can set a default such that whenever you click on the Metrics icon a particular Saved Chart, Chart Layout, Input Records, and Chart Title will be ready to be displayed by clicking on the "Show Chart" button. By setting a default, you will be one click away from seeing your default chart when you go to the Metrics page. This is useful if there is a particular chart you will be displaying on a frequent basis.

To set a default for the Metrics page:

1. Select a Saved Chart, Chart Layout, Input Records, and Chart Title to be used to generate your default chart
2. Click on the Set as Default button at the top of the page

Save

The "Save" operation allows you to change the saved chart layout, input records, or chart title associated with a saved chart. You must have the appropriate privilege to perform this operation on a group saved chart. To make changes to a saved chart on the Metrics main page:

1. Click on the Metrics icon in the Button bar
2. In the Saved Chart pulldown, select the saved chart you wish to modify
3. In the fields for Chart Layout, Input Records, and Chart Title make the desired changes
4. Click on the Save button

Save as New

The "Save as New" operation allows you to save a new chart based on the settings displayed on the "Select a Saved Chart" page or when [previewing](#) a saved chart. On the "Select a Saved Chart" page, this operation allows you to create a new saved chart with different selections for Chart Layout, Input Records, and Chart Title.

To use the "Save as New" operation on the "Select a Saved Chart" page:

1. Click on the Metrics icon in the Button bar
2. Make selections for the Saved Chart, Chart Layout, Input Records, and Chart Title
3. Click on the Save as New button
4. Enter a name for the new saved chart, then select whether the saved chart will be a group or personal saved chart. If you select "Group" for the Saved Chart Type field, select the group that should have access to this saved chart in the Group field.
5. Click OK to complete the operation

To use the "Save as New" operation after previewing a saved chart, review the instructions in the [preview](#) section.

Restrictions Related to Saved Group Charts and Chart Layouts

Depending on the user group privileges that have been assigned to you by your Tracker Administrator, you may only be able to use certain operations on certain saved charts or chart layouts for groups. For example, if you are a member of 2 user groups, but only have privileges to edit group saved charts or chart layouts for one of those user groups, some of the operations (e.g. "Add", "Edit") may be disabled when selecting a saved chart or chart layout for a group where you have limited privileges.

Adding a Saved Chart

To create a saved chart, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. If desired, select a saved chart in the Saved Chart pulldown to be used as a starting point for the new chart, then click on the Add button to the right of the "Saved Chart" pulldown

Add Saved Chart

Cancel Next »

Saved Chart Name

Saved Chart Type

Group

Cancel Next »

3. Enter a name for your Saved Chart in the Saved Chart Name field
4. In the Saved Chart Type field, select whether this chart will be a personal or group saved chart. Selecting "Group" indicates that any member of the user group selected in the "Group" field below will be able to access this saved chart.
5. If "Group" is selected in the field Saved Chart Type above, select which user group will be able to access this saved chart in the Group field. You will only be able to select from user groups in which you are a member (However, the Tracker Administrator can add saved charts for all user groups). If a user group is not available for selection, you may not be a member of the user group or you may not have sufficient privileges to add a chart for a user group. If you are a member of the user group or are logged in as a user with the Admin privilege, the user group may not have visibility to at least one Project and Form. Only user groups that have visibility to at least one Project and Form (configured in the Admin section) will be available for selection when creating group saved charts.
6. Click Next to continue

Add Saved Chart

Add

Cancel

Saved Chart Name **Company A Issues**
 Default Chart Layout Pie - default [Users]
 Default Input Records <All Records>
 Default Chart Title Current Status Totals

Calculate the ... (y-axis for line chart)

- number of input records
 average value of Estimated Size
 average time from Date Reported to Close Date in days
 average time from Reported to Closed in days
 number of records added
 number of transitions to Closed from <Any other State>
 number of records moved to Closed which passed through <Any State>

Perform calculations ... (x-axis for line chart)

- for every Status
 Don't chart data for a pull-down value selected above, if its data is all zeros
 for every Reported By in [Company A]
 Don't chart data for a pull-down value selected above, if its data is all zeros
 as of the current date & time (single calculation)
 as of the end of each day for the previous 2 week(s)
 as of the end of each day from to

Breakdown calculations ... (multiple lines for line chart)

- by Status
 by every Status in All
 do not breakdown calculations
 Don't chart data for a breakdown value if its data is all zeros

7. Select the criteria for the Saved Chart. Click [here](#) for full details of the criteria selections for a saved chart.
8. Click on the Add button

Editing a Saved Chart

To edit a saved chart, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. Select a saved chart in the Saved Chart pulldown
3. Click on the Edit button to the right of the Saved Chart pulldown
4. Make changes to the criteria of the saved chart
5. Click OK to save the changes

Deleting a Saved Chart

To delete a saved chart, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. Select a saved chart in the Saved Chart pulldown
3. Click on the Delete button to the right of the Saved Chart pulldown
4. Click OK to confirm the operation

If a saved chart is selected as one of the Home Page reports for one or more users, you will not be able to delete the saved chart until another report is selected in the [Preferences](#) section for each user.

Preview a Saved Chart

The preview operation allows you to make changes to the criteria of a saved chart before using the "Show Chart" operation to display the chart. This operation is useful when you want to display a chart with a change in the criteria for a saved chart, but want to preserve the saved chart's original settings. This is also useful for creating a new saved chart based on the criteria of an existing saved chart.

To preview a saved chart, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. Select a saved chart in the Saved Chart pulldown
3. Click on the Preview button to the right of the Saved Chart pulldown
4. If desired, make changes to the criteria
5. Click Save to save your changes. To create a new saved chart with the criteria displayed, click on the Save as New button. Otherwise, click on the Show Chart button to display the chart.
6. If you clicked on the Save as New button, you will be prompted to select a name, chart type, and group for the new saved chart.

Standard Saved Chart within Tracker

Within Tracker, the chart Project Status (Default) [Users] is installed by default. The description below is how the chart is configured by default, but your Tracker Administrator or another user with the appropriate privileges may have changed the chart's settings. This chart cannot be deleted.

Project Status (Default) [Users]

A saved chart that will generate a pie chart, which displays the relative number of records in each possible state for the project, form and workflow created by default in the workgroup.

Saved Chart Criteria

Each saved chart has criteria which defines the data and formats that will be displayed when the chart is generated. The options available when creating a saved chart are explained below:

- **Default Chart Layout**
The chart layout determines the look and feel of the chart (e.g. whether it is a pie, bar, line chart or table, whether it has a legend, etc.). Select a saved chart layout to be used with this saved chart. For information on creating a Chart Layout, review the [Chart Layout](#) section.
- **Project**
This field is only available if you have been given visibility to more than 1 project in Tracker. You can limit the metric criteria to only those records that belong to a particular project(s) or * to match any project. The selection made in this field will determine the options available in the Form field. To select multiple projects, hold down the Ctrl button on your keyboard while clicking on the projects to select them.
- **Form**
This field is only available if you have been given visibility to more than 1 form in Tracker. You must limit the metric criteria to only those records that were submitted using a particular form. However, depending on how your Tracker Administrator has configured the system, you may be able to select multiple forms or * to match any form. The selection made in this field determines which fields are available for selecting metric criteria. To select multiple forms, hold down the Ctrl button on your keyboard while clicking on the desired forms to select them. If you have selected one or more forms, a Get Fields button will be displayed. Click on the Get Fields button to refresh the metrics criteria page with the fields that belong to the forms you have selected. Only the fields and workflow states that are common to all of the forms selected will be available in the chart options.
- **Default Input Records**
This option determines which records will be included when performing the calculations to generate the chart. Select "<All Records>" to include all records in the database or choose a Saved Query to limit the records included in calculations. The filtering which is done by selecting a Saved Query is done based on the records as they are now (at the time you display the saved chart) with the following exceptions.
 - If you are calculating the *number of records added* and you select a saved query, the filtering is done based on the values of the Status, Assignee, and Product fields at the time the record was added. Since those values (Status, Assignee, and Product) are stored in the Record History for the Add operation, we can use the actual values at the time of the Add operation rather than the current values for the records. So, for example, if you select a saved query which matches only those records where you are the Assignee (e.g. Assigned To Me), the calculations will only include those records where you were the Assignee when the record was first added (as opposed to those records where you are currently the Assignee). For all record values other than Status, Assignee, and Product, the values used for filtering are the current values (since no other fields are stored in the Record History).

If you are calculating the *number of input records* or the *average value of <field>*, and you are performing the calculation *as of the end of each day/week/month...*, and you select a saved query, the filtering is done based on the values of the Status, Assignee, and Product fields as of the end of each day, week, or month displayed in the chart. Since those values (Status, Assignee, and Product) are stored in the Record History, we can use the actual values as of the dates used in the Chart rather than the current values for the records when doing the filtering. So, for example, if you select a saved query which matches only those records where you are the Assignee (e.g. Assigned To Me), the calculations will only include those records where you were the Assignee on the date used in each calculation (e.g. as of the end of each month for the past six months) as opposed to only including those records where you are currently the Assignee. For all record values other than Status, Assignee, and Product, the values used for filtering are the current values (since no other fields are stored in the Record History).

- Default Chart Title

Enter a title to be displayed at the top of the chart

- Calculate the ... (y-axis for a line chart)

Select a calculation to be done on the set of records you chose in "Default Input Records". If you selected a Chart Layout to produce a line chart, the selection made in this section will become the y-axis when the chart is displayed.

- number of input records

Selecting this option indicates that the number of records included in the chart data will match the number of input records determined selection in the "Default Input Records" field.

Example 1: If you select this option and "<All Records>" is selected for "Default Input Records", the chart data will include all records in the database.

Example 2: If you select this option and a saved query is selected for "Default Input Records", the chart data will display all records in the database that match the criteria in the saved query selected.

- calculated value of an Integer or Float field

Selecting this option indicates that a calculation (average, total, minimum, maximum) should be performed on the values of an Integer or Float field present in the set of records selected in "Default Input Records".

Example: If you select this option and "average" value of "Estimated Size" field, then the chart will calculate the average value of the Float field called Estimated Size within the set of records selected for "Default Input Records".

- calculated time between 2 date fields in a particular date increment

This option allows you to calculate a time (average, total, minimum, maximum) between the values of 2 date fields in a set of records. Selecting "<Now>" for the second date field indicates the calculation of time will be between the first date field and the current date and time.

Example: If you select this option and "average" value from "Date Reported" to "Fix Date" in "days", then the chart will calculate the average time in days between the date fields selected for the set of records listed in "Default Input Records".

- calculated time for record to progress from one state to another

This option allows you to calculate a time (average, total, minimum, maximum) over a set of records between the time each record was in a particular state (state 1) to the time when the record was in another state (state 2). This calculation uses the Record History to compare the date a record was in state 1 to the date a record was in state 2. The calculation will be the same if a record moved directly from state 1 to state 2 or passed through other states before moving to state 2.

Example: If you select this option and "average" value from "Reported" to "Closed" in "days", then the chart will calculate the average time in days it took a record to go from the Reported state to the Closed state.

- number of records added

Selecting this option indicates that the number of records included in the chart data will match the number of records created in the set of records listed in the "Default Input Records" field.

- number of transitions to a state from another state

This option allows you to calculate the total number of transitions that were made into a state (state 2) from another state (state 1). Both Edit and Task operations are counted as transitions. Selecting the option "<Any State>" for state 1 indicates that all transitions that moved a record from any state (including state 2) into state 2 will be included in the chart data. Selecting the option "<Any Other State>" for state 1 indicates that all transitions that moved a record from any state (except state 2) into state 2 will be included in the calculation. This calculation yields the total number of times a transition between two states occurred. The calculation will count each time the transition occurred even if it occurred on the same record multiple times.

Example: If you select "Scheduled" as state 2 and "Reported" as state 1, then the calculation will be the total number of times any record moved from the Reported state to the Scheduled state.

- number of records moved to a state which passed through another state

This option allows you to calculate the total number of records that moved to a state (state 2) which passed through another state (state 1). Both Edit and Task operations are included in this calculation. Selecting the option "<Any State>" for state 1 indicates that the calculation will count any record which has moved to state 2 (including from state 2 itself). Selecting a specific state for state 1 limits the calculation to records that passed through state 1 before reaching state 2. Unlike "number of transitions," this calculation will not include multiple "hits" for the same record. Even if the same record passed from state 1 to state 2 multiple times, it will only count the record once as it is counting number of records and not number of transitions. Also, if a record loops while in state 2, the record is assumed to have completed the move from state 1 to state 2, when it first moves into state 2. This calculation can take longer to display the results than other charts because a significant amount of history data can be involved.

- Perform calculations ... (x-axis for line chart)

Select an option to add a further constraint to the data that resulted from the option in the Calculate the ... (y-axis for line chart) option

above.

- o for every option in a field
 Selecting this option will perform the calculation selected in the Calculate the ... (y-axis for line chart) option above for every option within the field selected.
 Example 1: If you select this option and "Project" as the field, the chart will display a separate calculation for each project in your database.
 Example 2: If you select this option and "Status" as the field, the chart will display a separate calculation for each state in your database.
- o for every state in <State Group> or for every reported by or assigned to in [User Group]
 Selecting this option will perform the calculation selected in the Calculate the ... (y-axis for line chart) option above for every state included in the State Group selected or for every user (Reporter or Assignee) in the User Group selected. State Groups and User Groups are configured by your Tracker Administrator in the Admin section.
 Example: If you select this option with "Reported By" and "[Developers]", the chart will display a separate calculation for each user in the Developers user group who was the reporter of a record that matched the criteria in the Calculate the ... (y-axis for line chart) section.
- o as of the current date and time (single calculation)
 This option indicates that the chart should perform the calculation selected in the Calculate the ... (y-axis for line chart) option above as of the current date and time.
- o as of the end of or during a time increment for the previous X time increments
 This option indicates that the chart should generate the calculation selected in the Calculate the ... (y-axis for line chart) option above as of the end of or during each time increment for the number of increments selected.
 Example: If you select "as of the end of" each "day" for the previous "2" "weeks", the chart will generate 14 calculations (one value for the calculation as of the end of each day for the last 2 weeks).

Dates are displayed as two part dates (month & day), except that the first (left most) calculation and any calculation that begins a new year will include a three part date (month, day, and year). All date parts are displayed using 2 digit values (with leading zeros if necessary), including the year. The date format is based on the [preferences](#) selected by the user who clicked Show Chart. The time zone used for calculations (to determine midnight of a date) is the time zone specified in preferences section of the user who clicked Show Chart. If you select "during each week" or "during each month," each week or month will be displayed as two dates with a hyphen between the two (a date range).

When you select week or month, the calculation may include a partial week or month as the most recent value (month to date, week to date) so that it always includes information up to and including the current day. Selecting month will always give you a partial month for the most recent (right most) value, unless today is the last day of the month. When you select "during each month," the months will always begin on the first of the month. When you select "as of the end of" or "during" each week, for the previous N weeks, you will always get data for a full week in each calculation. However, if you select "as of the end of" or "during" each week for the previous N months or years, you may get a partial week value (so that the data includes exactly N months or exactly N years). To get data that always includes exactly one week for each data point, use N weeks (rather than N months or N years).

- o as of the end of or during a time increment for a date range
 This option indicates that the chart should generate the calculation selected in the Calculate the ... (y-axis for line chart) option above as of the end of or during each time increment for the specified date range. If you do not enter a value for the end of the date range (second date), the chart will use the day on which the chart is run (it will use today as the value). The dates you enter can include a time component, if desired. You can either click on the calendar icon to select a date or you can manually enter a date in the appropriate format (e.g. "mm/dd/yyyy HH:MM:SS AM/PM" or the date & time format selected in the [Preferences](#) section.). Click on the day to select the date to be entered into the date field. Click < or > to move backward or forward one month or click << or >> to move backward or forward one year. Click Now to set the date field to be the current date and time. Click on Exclude Time if you want to exclude the time information from being saved in the date field. For a field where the time information has previously been excluded, click Set Time if you wish to include the current time information in the field. Click OK to choose the highlighted date to be entered into the date field. Date will be selected and calendar dismissed when a date is clicked when the time is excluded. Dates displayed in **red** are non-business days according to the Business Days option in the [Preferences](#) section. Click Cancel to dismiss calendar without saving changes.
 Example: If you select "during" each "day" from "01/01/2005" to "01/05/2005", the chart will generate 5 calculations (one value for the calculation during each day in the date range specified).

Dates are displayed as two part dates (month & day), except that the first (left most) calculation and any calculation that begins a new year will include a three part date (month, day, and year). All date parts are displayed using 2 digit values (with leading zeros if necessary), including the year. The date format is based on the [preferences](#) selected by the user who clicked Show Chart. The time zone used for calculations (to determine midnight of a date) is the time zone specified in preferences section of the user who clicked Show Chart. If you select "during each week" or "during each month," each week or month will be displayed as two dates with a hyphen between the two (a date range).

When you select week or month, the calculations may include a partial week or month at the beginning and/or end, as necessary to fit within the date range. If you select "during each month," months are displayed from the first of the month to the end of the month, with the possible exception of the first and last months displayed. The first month may be a partial month if your date range does not begin on the first of the month. Your last month may be a partial month if your date range does not end on the last day of the month.

- Breakdown calculations by a field
 This option indicates that the calculations generated based on the selections made above should be broken down by a field. For each calculation, a value will be displayed for each option in the field selected. In addition, if the chart layout selected for the saved chart contains a legend, one legend entry will be present for each item in the field selected.

Example 1: If you select this option and select "Status", the chart will display a calculated value for each state in your database.

Example 2: If you select this option and select a pulldown called "Product", the chart will display a calculated value for each option menu item configured in the pulldown field.

- Breakdown calculations by every state in a <State Group> or by every user in a [User Group]
Selecting this option indicates that the calculations generated based on the selections made above should be broken down by each state included in the State Group selected or by each user (Reporter or Assignee) that is a member of the User Group selected. In addition, if the chart layout selected for the saved chart contains a legend, one legend entry will be present for each state or user (Reporter or Assignee) in the State Group / User Group selected.
Example: If you select this option and select "Assigned To" and "[QA]", the chart will display a calculated value for each user in the the QA user group who is the Assignee for the records that matched the chart criteria.
- Do not breakdown calculations
This option will not breakdown the calculations generated by the chart criteria in the y-axis and x-axis sections above.
- Don't chart data for a breakdown value if its data is all zeros
Checking the box for this option indicates that when the calculations are broken down per the option selected above, a separate calculation should not appear on the chart if its value is zero (e.g. it is zero for any particular option menu item / state / user).
Example: If you select the option "Breakdown calculations by the pulldown field "Product", then check the box for the option "Don't chart data for a breakdown value if its data is all zeros", and the chart data has 0 records that matched the criteria for Product A, the chart will not display a calculation or legend entry for Product A.

Saved Chart Layouts

A saved chart layout provides the formats used to display a saved chart. A saved chart cannot be displayed without selecting a saved chart layout. Examples of the formats that a saved chart layout provides are:

- whether a chart is a bar / pie / line chart or a table
- whether a legend should be displayed
- whether labels should be displayed to reflect the names of the data categories

To create a saved chart layout, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. In the Chart Layout field, select the default saved chart layout that corresponds to the chart type you wish to use. For example, if you wish to create a saved chart layout for a bar chart, select the default saved chart layout called "Bar - default [Users]"

Add Chart Layout

Chart Layout Name

Chart Layout Type

Group

Chart Display Type **Pie**

3. Click on the Add button to the right of Chart Layout field
4. Enter a name for your saved chart layout in the Chart Layout Name field
5. In the Chart Layout Type field, select whether this layout will be a personal or group layout. Selecting "Group" indicates that any member of the user group selected in the Group field below will be able to access this saved chart layout.
6. If "Group" is selected in the field Chart Layout Type above, select which user group will be able to access this saved chart layout in the Group field. You will only be able to select from user groups in which you are a member (However, the Tracker Administrator can add saved chart layouts for all user groups). If a user group is not available for selection, you may not be a member of the user group. If you are a member of the user group or are logged in as a user with the Admin privilege, the user group may not have visibility to at least one Project and Form. Only user groups that have visibility to at least one Project and Form (configured in the Admin section) will be available for selection when creating group saved chart layouts.
7. Click Next to continue

Add Chart Layout

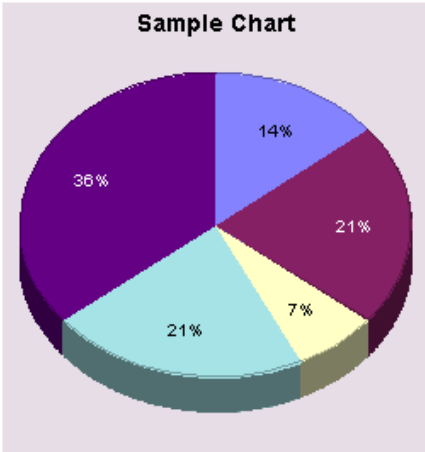
Chart Layout Name **Pie without legend**

Width x Height x

Label Length characters (maximum)

Display dynamic layout options (below) with chart

<input checked="" type="checkbox"/> Use 3D Mode	<input checked="" type="checkbox"/> Show Pie Labels	
<input type="checkbox"/> Show Legend	Legend Position	<input type="text" value="Left"/>
<input type="checkbox"/> Show Slice Separators	Slice Style	<input type="text" value="Detached"/>
<input checked="" type="checkbox"/> Show Slice Values	Slice Value Style	<input type="text" value="Floating (mouse over)"/>
<input checked="" type="checkbox"/> Show Slice Percentage	Percentage Style	<input type="text" value="Inside"/>
<input checked="" type="checkbox"/> Show Slice Labels		



8. Select the options for the Saved Chart Layout. Click [here](#) for full details of the options available for a saved chart layout. A sample chart is displayed in the lower right corner of the page. As you make selections to the chart layout options, the sample chart will reflect these changes.
9. Click on the Add button to save the chart layout

Chart Layout Options

The Chart Layout Options determine the formats used to display the data of the saved chart selected.

Each chart type (bar, pie, line, table) has its own set of chart layout options as follows. Click on the link below to see the options that correspond to the chart type selected. For all chart types, checking the box to the left of the option enables the option to be applied to the chart layout:

[Bar Chart Options](#)

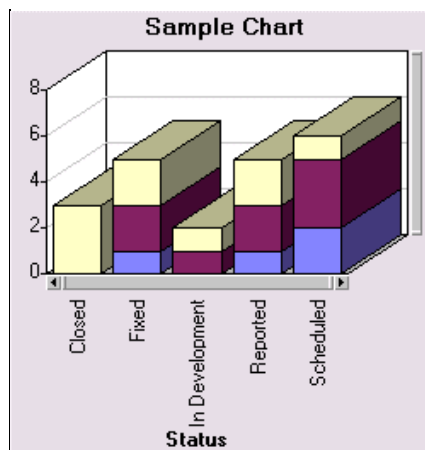
[Line Chart Options](#)

[Pie Chart Options](#)

[Table Options](#)

Bar Chart Options

The following options are available for bar chart layouts.



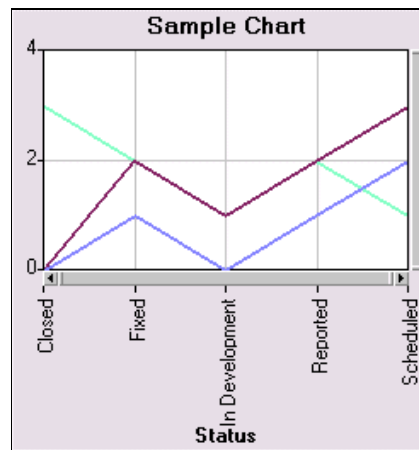
- Width x Height**
 Enter the dimensions of the area that should be used to display the chart. We recommend using "600 x 400" so that the chart area is visible within the bounds of a user's screen when the browser window is maximized. Using a setting like "800 x 600" or "1200 x 800" will cause most users to have to use a browser's scroll bars to see the full chart area.
- Label Length**
 A label in the chart is generated from the records included in the chart data. Enter the maximum number of characters allowed for a label in the chart (up to 50 characters can be displayed). If a data field is longer than the number of characters specified here, it will be truncated when used as a chart label. Examples of labels are the text "Closed" and "Fixed" in the [Bar Chart Sample](#).
- Display dynamic layout options (below) with chart**
 Checking the box for this option will display the chart layout options below a chart generated by using the "Show Chart" operation. This option enables you to change a chart's layout options dynamically after the chart is displayed without altering the original saved chart layout.
- Use 3D mode**
 Checking the box for this option enables the chart to be displayed in three dimensions instead of two. The Bar Chart Sample has this option enabled.
- Bar Type**
 Determines how the bars should be displayed when the data is broken down by a particular pulldown field. Selecting "Side by side" will display the bar for each category side by side or "Stacked" will display the break down categories stacked upon each other for each bar. The [Bar Chart Sample](#) has this option set to "Stacked".
- Show Legend**
 Displays a color coded legend to explain the data categories displayed in each slice
- Legend Position**
 If the Show Legend option is enabled, this option determines whether the legend appears to the left or the right of the chart
- Show Bar Labels**
 Checking the box for this option will display the labels for each bar. This option is enabled in the [Bar Chart Sample](#), resulting in the labels "Closed" and "Fixed" to be included.
- Bar Label Style**
 If Show Bar Labels is enabled, this option determines where the bar labels should be displayed. Selecting "Below and Floating" will show the labels below each bar as well as when the mouse is moved over a bar. Choosing "Floating (mouse over)" will only display the label when the mouse is moved over a bar. "Below" will display the label below each bar. The [Bar Chart Sample](#) has this option set to "Below".
- Show Bar Outlines**
 Checking the box for this option will outline each bar. The [Bar Chart Sample](#) has this option enabled.
- Bar Label Angle**
 If Show Bar Labels is enabled and Bar Label Style is set to either "Below and Floating" or "Below", this option determines the angle of the label. If the labels have a large number of characters, using "90" or "270" for this option will yield the best results. The [Bar Chart Sample](#) has this option set to "270".
- Show Range Adjuster**
 Checking the box for this option will display the range adjustment bar, which allows you to change the range of the Y-axis by scrolling the range adjuster along the bar. This option is useful for focusing in on a particular area of the chart. The [Bar Chart Sample](#) has this option enabled.
- Bar Alignment**
 Select "Vertical" to display the bars vertically or select "Horizontal" to display the bars horizontally. The [Bar Chart Sample](#) has this option set to "Vertical".
- Show Range Labels**

Checking the box for this option will display the labels for the Y-axis. The [Bar Chart Sample](#) has this option enabled.

- **Show Range Lines**
Checking the box for this option will display a line for each range label marked on the Y-axis. This option is enabled in the [Bar Chart Sample](#).
- **Show Value Labels**
Checking the box for this option will display the number of items in a category in each bar (or bar section for stacked charts).
- **Value Label Style**
If Show Value Labels is enabled, this option determines where the value labels should appear. Selecting "Floating (mouse over)" will only display the value when the mouse is moved over a particular bar, "Inside" will display the values within each bar or "Outside" will display the values above each bar.
- **Show Bar Scroller**
Checking the box for this option will display the bar scroller, which allows you to change the number of bars shown on the X-axis by moving the scroller along the bar. This option is useful for focusing in on a particular area of the chart. This option is enabled in the [Bar Chart Sample](#).
- **Initial Bar Display**
If Show Bar Scroller is enabled, this option determines which bars should be displayed on the X-axis. Selecting "All" will display all data, or "First 20" will show the first twenty bars in the data set, or "Last 20" will show the last twenty bars in the data set.

Line Chart Options

The following options are available for line chart layouts.



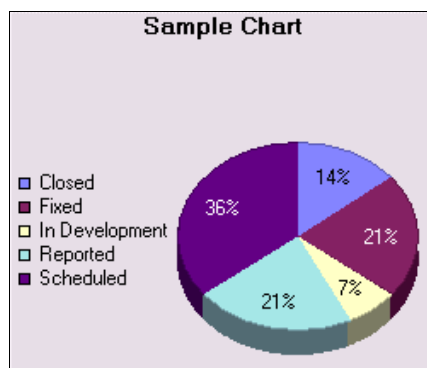
- **Width x Height**
Enter the dimensions of the area that should be used to display the chart. We recommend using "600 x 400" so that the chart area is visible within the bounds of a user's screen when the browser window is maximized. Using a setting like "800 x 600" or "1200 x 800" will cause most users to have to use a browser's scroll bars to see the full chart area.
- **Label Length**
A label in the chart is generated from the records included in the chart data. Enter the maximum number of characters allowed for a label in the chart (up to 50 characters can be displayed). If a data field is longer than the number of characters specified here, it will be truncated when used as a chart label. Examples of labels in the [Line Chart Sample](#) are "Closed" and "Fixed".
- **Display dynamic layout options (below) with chart**
Checking the box for this option will display the chart layout options below a chart generated by using the "Show Chart" operation. This option enables you to make changes to a chart's layout options after the chart is displayed without altering the original saved chart layout.
- **Use 3D mode**
Checking the box for this option will display the chart in three dimensions instead of two.
- **Show Stacked**
Checking the box for this option will display the lines for each break down category stacked on top of each other.
- **Show Legend**
Checking the box for this option will display a color coded legend to explain the data categories displayed on each line.
- **Legend Position**
If the Show Legend option is enabled, this option determines whether the legend appears to the left or the right of the chart
- **Show Value Labels**
Checking the box for this option will display the number of items in a category at each data point on the line.
- **Value Label Style**

If the option Show Value Labels is enabled, this option determines where the values should appear. Selecting "Point" will display each value on the data point on the line. Choosing "Outside" will display each value above the data point on the line.

- **Show Value Scroller**
Checking the box for this option will display the value scroller, which allows you to change the values shown on the X-axis by moving the scroller along the line. This option is useful for focusing in on a particular area of the chart. This option is enabled in the [Line Chart Sample](#).
- **Initial Value Display**
If the option Show Value Scroller is enabled, this option determines which values should be displayed on the X-axis. Selecting "All" will display all data, "First 20" will show the first twenty points in the data set or "Last 20" will show the last twenty points in the data set.
- **Show X-Axis Labels**
Checking the box for this option will display labels for each point on the X-axis. This option is enabled in the [Line Chart Sample](#), resulting in the text "Closed" and "Fixed".
- **X-Axis Label Angle**
If the option Show X-Axis Labels is enabled, this option determines the angle of the label. If the labels have a large number of characters, using "90" or "270" for this option will yield the best results. The [Line Chart Sample](#) has this option set to "270".
- **Show X-Axis Lines**
Checking the box for this option will display a line for each category listed on the X-Axis. This option is enabled in the [Line Chart Sample](#).
- **Show Range Lines**
Checking the box for this option determines whether lines should be displayed for each value marked on the Y-axis. The [Line Chart Sample](#) has this option enabled.
- **Show Range Labels**
Checking the box for this option will display the labels for the Y-axis. The [Line Chart Sample](#) has this option enabled.
- **Show Range Adjuster**
Checking the box for this option will display the range adjustment for the Y-Axis, which allows you to change the range of the Y-axis by scrolling the range adjuster along the bar. This option is useful for focusing in on a particular area of the chart. This option is enabled in the [Line Chart Sample](#).
- **Show Value Highlights**
Checking the box for this option will display a circle at each point on the line that represents a data value.

Pie Chart Options

The following options are available for pie chart layouts.



- **Width x Height**
Enter the dimensions of the area that should be used to display the chart. We recommend using "600 x 400" so that the chart area is visible within the bounds of a user's screen when the browser window is maximized. Using a setting like "800 x 600" or "1200 x 800" will cause most users to have to use a browser's scroll bars to see the full chart area.
- **Label Length**
A label in the chart is generated from the records included in the chart data. Enter the maximum number of characters allowed for a label in the chart (up to 50 characters can be displayed). If a data field is longer than the number of characters specified here, it will be truncated when used as a chart label.
- **Display dynamic layout options (below) with chart**
Checking the box for this option will display the chart layout options below a chart generated by using the "Show Chart" operation. This option enables you to make changes to a chart's layout options after the chart is displayed without altering the original saved chart layout.
- **Use 3D mode**
Checking the box for this option will display the chart in three dimensions instead of two. The [Pie Chart Sample](#) has this option enabled.

- **Show Pie Labels**
Checking the box for this option displays the label for each pie (category) when multiple pies are included in the same chart.
- **Show Legend**
Checking the box for this option will include a color coded legend to explain the data categories displayed in each slice. The [Pie Chart Sample](#) has this option enabled.
- **Legend Position**
If the Show Legend option is enabled, this option determines whether the legend appears to the left or the right of the chart. This option is set to "Left" in the [Pie Chart Sample](#).
- **Show Slice Separators**
Checking the box for this option will display lines (borders) to separate each pie slice.
- **Slice Style**
This option determines how a pie slice should be formatted when it is selected (by double clicking on a particular pie slice). Selecting "Detached" displays the selected pie slice slightly removed from the rest of the pie, or "Circle" adds a circle inside the slice to note which one is selected, or "Triangle" adds a triangle inside the slice to note which one is selected.
- **Show Slice Values**
Checking the box for this option will display the number of items that matched the category represented in each pie slice.
- **Slice Value Style**
If the option Show Slice Values is enabled, this option determines where the values should appear. Selecting "Floating (mouse over)" will only display the value when the mouse is moved over a particular pie slice, or "Inside" will display the values in each pie slice.
- **Show Slice Percentage**
Checking the box for this option will display the percentage of items that matched the category represented in each pie slice. The [Pie Chart Sample](#) has this option enabled.
- **Slice Percentage Style**
If Show Slice Percentage is enabled, this option determines where the percent value should appear. Selecting "Floating (mouse over)" will only display the value when the mouse is moved over a particular pie slice, or "Inside" will display the values in each pie slice. The [Pie Chart Sample](#) has this option set to "Inside".
- **Show Slice Labels**
Checking the box for this option will display the label for each category when the mouse is moved over a particular pie slice.

Table Options

The following options are available for charts displayed as a table.

	Win	Linux	Total
Closed	26	32	58
Fixed	132	276	408
Total	158	308	466

- **Label Length**
A label in the chart is generated from the records included in the chart data. Enter the maximum number of characters allowed for a label in the chart. The maximum value is 50 characters, which is set for this option by default. If a data field is longer than the number of characters specified here, it will be truncated when used as a chart label. An example of the Chart Label is the text "Closed" and "Fixed" in the [Table Sample](#).
- **Value Label Style**
Select whether the data values should be displayed as rows or columns in the table. The [Table Sample](#) shows the data values in rows.
- **Show Row Totals**
Checking the box for this option will include a column that has the sum of the data values for each row displayed. The [Table Sample](#) has this option enabled, resulting in the "Total" column displayed with values "58" and "408".
- **Show Column Totals**
Checking the box for this option will include a row that has the sum of the data values for each column displayed. The [Table Sample](#) has this option enabled, resulting in the "Total" row displayed with values "158" and "308".
- **Decimal Places**
The data values in the Table will be displayed with the number of decimal places entered in this field. The default number of decimal places for

new Table layouts is 2. The maximum number of decimal places that can be entered is 7.

Edit a Chart Layout

To edit a chart layout, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. In the Chart Layout field, select the layout you wish to modify
3. Click on the Edit button to the right of the Chart Layout field
4. Make changes to the layout, then click OK

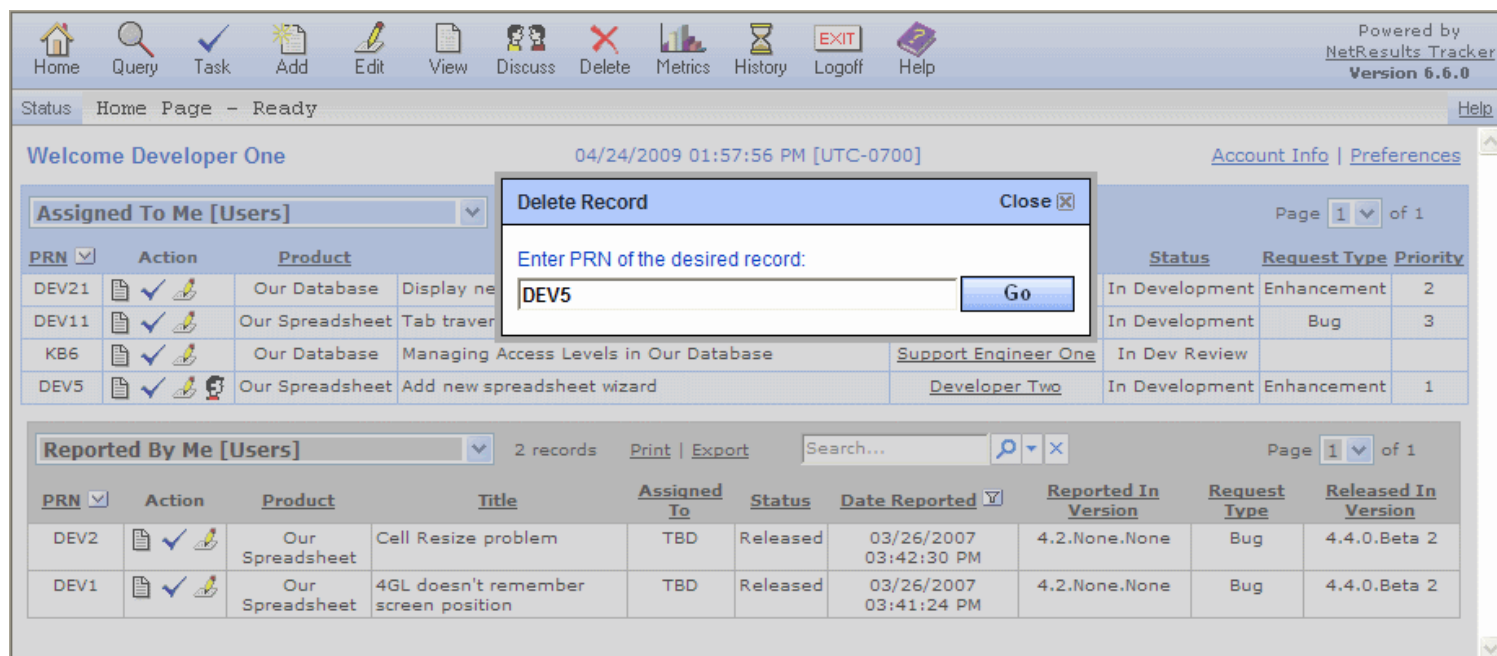
Deleting a Chart Layout

To delete a chart layout, perform the following steps:

1. Click on the Metrics icon in the Button bar
2. In the Chart Layout field, select the layout you wish to modify
3. Click on the Delete button to the right of the Chart Layout field
4. Click OK to confirm the operation

 To delete a record:

1. Click on the Delete icon in the Button Bar
2. The Search Window will appear. You can enter the record number you would like to delete and click Go.



Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Status Home Page - Ready

Welcome Developer One 04/24/2009 01:57:56 PM [UTC-0700] Account Info | Preferences

Assigned To Me [Users]

Delete Record Close X

Enter PRN of the desired record:

DEV5 Go

PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV21		Our Database	Display ne						
DEV11		Our Spreadsheet	Tab traver						
KB6		Our Database	Managing Access Levels in Our Database						
DEV5		Our Spreadsheet	Add new spreadsheet wizard						

Reported By Me [Users] 2 records Print | Export Search... Page 1 of 1

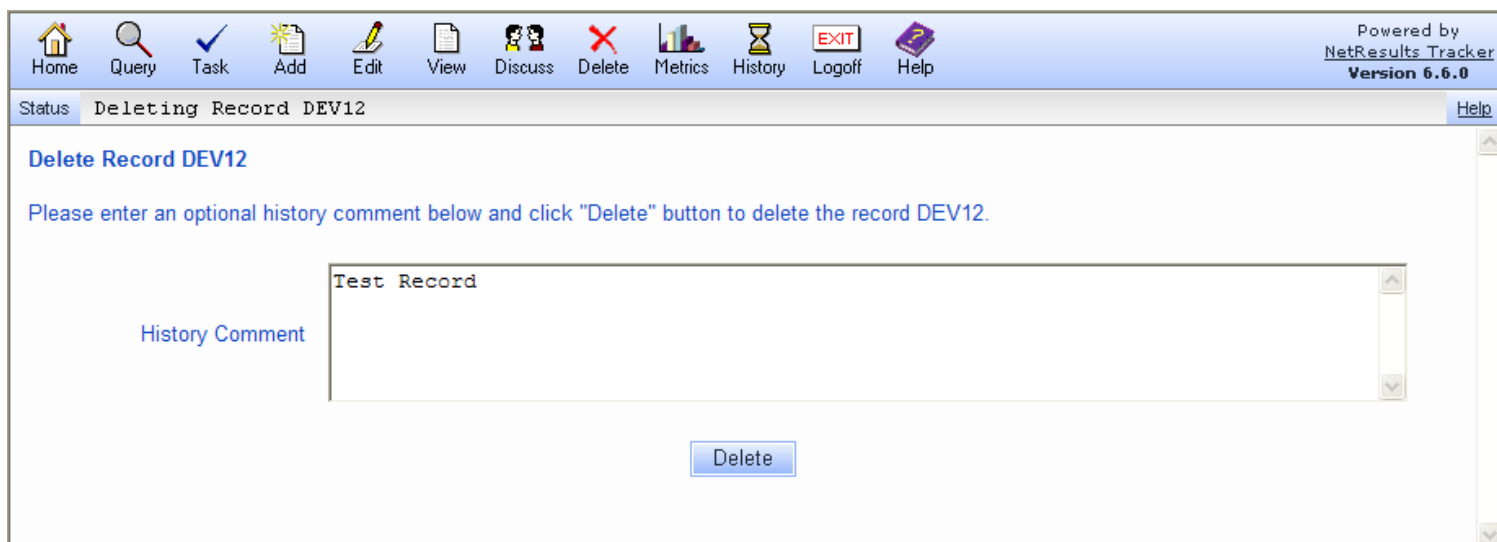
PRN	Action	Product	Title	Assigned To	Status	Date Reported	Reported In Version	Request Type	Released In Version
DEV2		Our Spreadsheet	Cell Resize problem	TBD	Released	03/26/2007 03:42:30 PM	4.2.None.None	Bug	4.4.0.Beta 2
DEV1		Our Spreadsheet	4GL doesn't remember screen position	TBD	Released	03/26/2007 03:41:24 PM	4.2.None.None	Bug	4.4.0.Beta 2

Once you've selected a specific record, the Delete Page will be displayed.

3. Enter information into the History Comment field
4. Click on the Delete button to proceed, click OK when prompted to confirm this operation
5. A confirmation page will be displayed. If you wish to delete another record, enter the PRN for the record in the Delete another record field and click on the Delete button. Or, click on either the Go To Home Page or Go To Last Query Results buttons

Note that when you delete a record, by default, Tracker does not remove it from the database. Instead the "Deleted" field of the record is set to "Yes". By default, queries do not include such deleted records; however, deleted records can be included in the query results by setting the "Deleted" field to "Yes" or "*" when defining the query criteria. If, at a later time, you would like to make this record visible again, you can directly [edit](#) the record and change "Deleted" attribute to the value "No".

However, if your Tracker administrator has changed the default delete behavior, the delete may be permanent. Check with your Tracker administrator before performing a delete that you may wish to recover.



Home Query Task Add Edit View Discuss Delete Metrics History Logoff Help

Status Deleting Record DEV12

Delete Record DEV12

Please enter an optional history comment below and click "Delete" button to delete the record DEV12.

History Comment

Test Record

Delete

Powered by NetResults Tracker Version 6.6.0

In order to print documents from Tracker, you can click on the Print link present on the Home, Query History, Metrics and View pages of Tracker to print the contents of the frame where the record(s) are displayed.

To print the reports displayed on the Home Page, go to the Home Page and click on the Print link to the right of the Report Pulldown at the top of the Home Page report you wish to print.

To print Query Results, run the query, then select either Table or Text for the format. Table format resembles the same table as shown on the Query Results page. Text format removes the table layout and lists each record sequentially from top to bottom. Click on the Print link in the upper right corner to begin printing the query results.

To print History reports, run the History query, then click on the Print link in the upper right corner.

To print charts generated on the Metrics page, run the chart, then click on the Print link in the upper right corner.

Please note that when the preference [Exclude Time From Reports](#) is enabled and a Date field is displayed in the report layout, the time information will not be included (only the date) when print previewing or printing a report on the Query, Home or History pages.

To print individual records from the View Page, click on the Format for Printing link in the upper right corner to display a printer-friendly format of the View Page, then click on the Print link in the upper right corner. This method allows you to print an individual record with the full content of each field.

To print this Tracker help file, there are 2 ways to print out the complete set of files.

Use Print All Linked Documents Option

Go to the [Table of Contents](#), then select File > Print in your browser to launch the print properties dialog. Click on the option tab, then check the box for the option called "Print all linked documents". This will print the table of contents and each of the subsections listed as clickable links (each individual Help section). The availability of the "print all linked documents" option may depend on your operating system. If the option is not available, use the next method described below.

Print via Windows Explorer

This method will print all of the Help section, but the pages will need to be manually sorted. In Windows Explorer, browse to the directory where Tracker is installed. Typically, C:\inetpub\wwwroot\NetResultsTracker\workgroup, where workgroup is ptdev, ptweb, pteval, etc. In the workgroup folder will be a subdirectory called Help. In the Help folder, there are the following directories: Admin, Install, Std, UMS and WMS. In each of these folders there will be a table of contents file. It is admin_toc.htm for Admin, install_toc.htm for Install, bots_toc.htm for Std, ums_toc.htm for UMS and wms_toc.htm for WMS. Print each of these files first. Then go into the Admin directory and select all of the files, then right-click and select print. Do the same for the files in the Install, Std, UMS and WMS folders. You can use the printed table of contents files to help you sort the remaining web pages. There is one web page for each table of contents entry. The corresponding title is at the top of each web page.

If you wish to print information other than items mentioned above, use your browser's print functionality to print the information.

Tracker can be configured as a Knowledge Base. When the Knowledge Base feature is enabled, you can perform searches using the Knowledge Base Search Page to find the information you are seeking.

Knowledge Base Search Page

To search the Knowledge Base for information, browse to the Knowledge Base Search Page by going to

<http://servername/workgroup/kb/search.asp>

where `servername` is the TCP/IP host name of the machine where the Tracker server software is installed, and `workgroup` is the name of the Tracker workgroup (e.g. `pteval`) you wish to access. If you are not sure where Tracker was installed on your network, please ask your Tracker Administrator.

Performing a Search

To perform a basic search of the knowledge base, enter keywords in the Search Words field described below, then click on the Search button. If you wish to skip to the information about the [Results Page](#) or the [Knowledge Base Articles](#). Click on one of the following links:

- [Results Page](#)
- [Knowledge Base Articles](#)

To perform an advanced search, make selections in the available options on the Search Page, then click on the Search button to return the results. The options are described in detail below. Click on the Defaults button to return all components on the Search page to their default selections. This will clear any criteria or selections you have made in the Search Page.

A sample Knowledge Base Search Page is displayed below.

Knowledge Base Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Knowledge Base Search

For a basic search, enter keywords in **Search For** and click **Search**.
 For an advanced search, change the default settings in sections 2 - 5.
 To start a new search, click **Defaults** to reset the search parameters.

1. Search For **2. Use Search Method**

Any Word

3. Search In

Title
 Description
 Workaround

4. Apply Search Filters

Product

None
 Product - 1
 Product - 2

Apply Filter

5. Use Search Preferences

Search what's new within last days

Display results per page

Open search results item in browser window

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[Tracker Support](#) | [Tracker Sales](#)

Use **Quick Search** to go directly to an article.
 Use **Quick Links** to run a pre-defined search.
 For further assistance, use **Additional Resources**.

Quick Search

PRN

Quick Links

Additional Resources

[Read Product Manuals](#)
[Initiate Support Request](#)

Depending on the configuration set by your Tracker Administrator for the Search Page, the following components may be available on the Search Page to use when performing a search:

Search Words

Enter a key word(s) or phrase to be used as search criteria in the space provided. In the example above, the Search Words field is called 1. Search For.

Search Methods

Select the method that should be used when performing the search. One or more of the following choices may be available for selection: Any Word, All Words, Exact Phrase. In the example above, the Search Methods pulldown is called 2. Use Search Method.

When choosing Any Word, the search will return all articles which contain at least one word entered in to the Search Words field.

When choosing All Words, the search will return all articles which contain all words typed into the Search Words field.

When selecting Exact Phrase, the search will return all articles which contain the exact string of words as entered into the Search Words field.

When selecting Boolean Expressions, the search will return all articles that match the Boolean Expression entered using operators AND, OR or NOT. A + sign can be used as "AND". You can also use quotes to distinguish a string of words as one part of the Boolean expression.

The table below shows examples of the search results obtained by entering "access denied" as the Search For with each of the different Search Method.

Search Word(s)	Search Method	Results
access denied	Any Word	The search will return all articles which contain the word "access" OR the word "denied".
access denied	All Words	The search will return all articles which contain both "access" AND "denied".
access denied	Exact Phrase	The search will return all articles which contain the string "access denied".
access OR denied	Boolean Expression	The search will return all articles which contain the word "access" OR the word "denied".
access AND denied	Boolean Expression	The search will return all articles which contain the word "access" AND the word "denied".
access + denied	Boolean Expression	The search will return all articles which contain the word "access" AND the word "denied".
access NOT denied	Boolean Expression	The search will return all articles which contain the word "access" but NOT the word "denied".

Search Fields

Select the fields in each article that should be used when performing the search. In the sample Search Page at the top of this section, Search Fields is called 3. Search In. The fields you select will be searched to see if they contain the key word(s) you entered in the Search Words field.

To select a field, click on it so that it is highlighted. To select multiple fields, click on the fields you wish to select while holding down the CTRL button on your keyboard. To select all fields in the list, click on the Select All button to the left of the Search Fields list.

Search Filters

Select a value(s) in a field to be used as a filter for the search. In the sample Search Page at the top of this Help section, the Search Filters option is called 4. Apply Search Filters. The value(s) you select will be used to limit the search results to only those articles which match the value(s) you selected.

To select a value, click on it so that it is highlighted. To select multiple values, click on the values while holding down the CTRL button on your keyboard. Check the Apply Filter box to the right of the field to limit the search results based on the values selected for the field. Uncheck the Apply Filter box if you do not wish to limit the search results based on the field to the right of the check box.

Using the sample Search Page as an example, the values "Defect" and "Hot Fix" are selected as search filters, indicating that the search results should only include articles that have "Defect" or "Hot Fix" selected as the "Article Type".

Search Preferences

The Search Page may be configured to allow you to select preferences to be applied to the results of your search. In the sample Search Page at the top of this section, the preferences are displayed under 5. Search Preferences. The preferences described below may be available on the Search Page:

- Search what's new within the last given number of days from a Date Field narrows the search results to be articles that were modified within the last X number of days. The available choices for number of days are all, 2, 7, 14, 30, 60, 90, 180.
- Display a given number of results per page sets the number of articles that will be displayed per page in a list as

the result of a search. The choices for the number of results per page are 10, 20, 30, 50, 100.

- Open search results item in same or new window allows you to choose whether the list of results are displayed in the same browser window as the Search Page or are opened in a new browser window.

Quick Search

If you know the number (may be called Article ID, PRN, Record Number, or another name) of the Knowledge Base article you want to see, type this number into the Quick Search section on the right pane of the Search Page, then click on the Go button. This will immediately display the Knowledge Base article you requested. The Quick Search field is called Article ID in the sample Search Page shown at the top of this section.

Quick Links and Additional Resources

Your Tracker Administrator may have included a section called Quick Links in the right pane of the Search Page. If so, clicking on one of the Quick Links displayed will perform a pre-defined search and display the results. The sample Search Page at the top of this Help section includes 2 Quick Links: "Articles added in the last 7 days" and "Known Issues in the Latest Version".

Other useful information may be displayed such as links to other web sites or documentation. An example of this type of information can be found in the Additional Resources section in the right pane of the sample Search Page above.

The Results of a Search

After clicking on the Search button or clicking on one of the Quick Links, the Knowledge Base will be searched to find any articles that match the criteria entered in the Search page. The articles that match the criteria will be displayed on the Results page similar to the sample below. The example below displays the result of a search for articles that contain the keyword "page".

The screenshot shows a Mozilla Firefox browser window titled "Knowledge Base Results - Mozilla Firefox". The browser's address bar and menu bar are visible. The main content area displays "Knowledge Base Search Results" with two buttons: "Refine Search" and "New Search". Below this, it states "Search Results: Found 5 item(s)" and "Page 1 of 1". A table lists the search results:

PRN	Title	Article Type	Product	Version	Publication Date
<u>15</u>	"Access denied" error during login	Tech Note	Our Database	Version 2	10/12/2009 12:08:22 PM
<u>14</u>	"Missing operator" error after creating a new form	Tech Note	Our Database	Version 2	10/12/2009 01:32:10 PM
<u>13</u>	"Incompatible OS" error during installation	Tech Note	Our Browser	Multiple Versions	10/12/2009 01:31:53 PM
<u>12</u>	Browser crashes when trying to view GFR files in Version 2.0.1	Defect	Our Browser	Version 2	10/12/2009 01:32:56 PM
<u>1</u>	404 page not found	Tech Note	Our Browser	Multiple Versions	10/08/2009 12:20:10 PM

At the bottom of the table, it says "Page 1 of 1". Below the table are two buttons: "Refine Search" and "New Search". At the very bottom, there are links for "Support" and "Sales", and a status bar showing "Done".

At the top of the Results page, the total number of articles that matched the search criteria will be displayed at the top. If there are multiple pages of results, you can jump to another page of results using the page pulldown at the top right corner of the Results page. You can click on the heading of any underlined column to dynamically sort the results by that field. To view the contents of an article, click on the Article Number. The Article Number is always the first column on the left of the Results page, but

the name of this field may be different (it may be called Record Number, PRN, or something else).

Refine Search

To perform another search based on the criteria used to generate the current results, click on the Refine Search button. Clicking on the Refine Search button will return you to the Search page, preserving the criteria you entered to run the previous search.

New Search

To perform a new search, click on the New Search button. Clicking on the New Search button will return you to the Search Page with defaults selected and any keywords used in the previous search will no longer be displayed.

Knowledge Base Articles

A Knowledge Base article contains a summary section at the top and may have larger text fields in the body of the article. A sample article is displayed below.

Results

If you performed a search in the Knowledge Base, a Results button will be available at the top to return to the Results page of the last search performed.

New Search

To perform a new search, click on the New Search button. Clicking on the New Search button will return you to the Search Page with defaults selected and any keywords used in the previous search will no longer be displayed.

Knowledge Base Article ID 12 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Knowledge Base Article

Results New Search

Browser crashes when trying to view GFR files in Version 2.0.1

PRN	12
Product	Our Browser
Oldest Version	2.0.1
Newest Version	2.0.1
Publication Date	10/12/2009 01:32:56 PM

Description

The GFR support component is optional in the Version 2.0.1 installation program. By default, it is not installed. If you installed Version 2.0.1 and did not select the GFR option, then tried to view a GFR file, a browser crash would occur. To resolve this issue:

1. Download the hotfix listed in the Attachments section
2. Copy it to the the installation directory. To locate your installation directory, go to **Start->Programs->Our Browser->Installation Settings**. Take note of the path listed for "Installation Directory" and paste the hotfix file you downloaded into that directory.
3. Go to **Start->Programs->Our Browser->Installation Settings->Repair**
4. Choose the option "Repair All"
5. When prompted, choose the option "Add New Components"
6. Check the box for GFR Support, then click on the Add button

Workaround

None

Attachments

[hotfix KB 12](#)
[hotfix instructions KB 12](#)

Results New Search

[Support](#) || [Sales](#)

Done

Windows Time Zone Selection Chart

[Help Topics](#)

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