EFFECTIVE CLOUD-BASED ISSUE TRACKING

AdminiTrack 3.0

User's Guide

Updated August 3, 2012

Contents

Welcome

AdminiTrack is a premier Software-As-A-Service (SaaS) provider located in Atlanta, Georgia, USA. We host a cloud-based issue and task tracking application designed specifically for professional project teams. We are one of the top online issue tracking providers and currently serve businesses of all sizes in over 25 countries.

New Features in Version 3.0

Enhancements to Issues List

- Added **Status** filter.
- Added **Custom Show Filters** – define your own private Show filters, each with up to three fields and values, to further refine the Issues List.
- New batch actions:
  - Change Project for selected issues
  - Change Status for selected issues
- Added column named **O/C** - indicates whether the issue state is Open or Closed.
- Increased number of columns that may displayed from 8 to 20.
- Export to Excel file.
- Print feature

Define Issue Statuses (Workflow)

- Issue Status has been expanded, allowing you to define as many status values as you need.
- Each status will have an attribute (Open or Closed) indicating the state of the issue.
- The new statuses will make managing and tracking the workflow of the issues much easier and more intuitive.

Field Manager - Standard Fields

- Lookup values are customizable for each project.
- Ability to rename some standard fields.
- Identify which fields are required.
- Can add popup help text for standard fields.

Field Manager - Custom Fields

- Increased number of custom fields from 5 to 15.
- Ability to define various data types, including date, integer, decimal, numeric, drop down list, single-line text and multi-line text.
- Lookup values are customizable for each project.
- Identify which fields are required.
- Can add popup help text for custom fields.

Form Manager

- Select which standard and custom fields to add to the **Issue** form and specify display order.
- Select which standard and custom fields to add to the **Resolution** form and specify display order.

View Issue

- Added **Delete Issue** button - You may delete closed issues only if the account setting permits or you are an Administrator.
- **Notify Now for this Issue** tab - You may send a one-time-only email notification for an issue. All routine notifications must be specified from the Email Notification Events page.

Sorting Lookup Values

- Select either manual or alphanumeric sorting for lookup values. This specifies how the values are sorted in drop-down list.

Standard Reports

- Export standard reports to Excel file.
- New scaled graphs are easier to read.

Email Gateway

- Create new issues by sending an email to a special email address.

Custom Reports

- **Choose Columns** link on report results page allows user to select additional columns without having to edit custom report definition.
- Floating date for date fields – Define a date that is today, past or future. You may type **today:0** to represent today's date. To represent a date in the past 30 days before today's date, for example, you would enter **today:-30**. Provides flexibility in creating date ranges.

Search

- Ability to save query criteria on Advanced Search form.
- Export search results (Advanced, Basic, and Comments) to Excel file.
- Improved Basic Search – New Google-like searches by word, phrase or boolean such as "page error" AND ("failure" OR "warning")

New user role permissions

- Change Issue Status - accommodates multiple Open and Closed status attributes.
- Assign if Assigned - User may assign issue only when current assignee.
- Change Project of Issue - User may change the project an issue belongs to.
- Add Attachments to Issues – User may add attachments to issues.
- Add Attachments to the Document Library – User may add attachments to the Document Library for any of their projects.
- Delete Attachments from the Document Library – User may permanently delete attachments from the Document Library for any of their projects.

Clone project

- Clone (copy) an existing project's details to create a new project.

Main Menu

- Online Help: Updated interface and content with search and bookmark capabilities.
- Contact Sys Admin: send an email to your account's System Administrator.

Sign-in page

- Forgot My Passcode link - Can request sign-in credentials based on email address only. However, the account number will be required if the email address is associated with more than one account.
- Sign-in page now displays local System Administrator's email address in error message if an inactive user attempts to sign in. An inactive user must provide valid sign-in credentials in order for local System Administrator's email address to be displayed.

Getting Started Topics

Getting Started for Administrators

To set up your account:

1. Remove all sample data by deleting issues, then users and projects.
2. Define your user roles by clicking on **Edit Roles/Perm** from the Main Menu. Review each existing user role and the permissions for each. You may add your own new user roles or change or delete any existing user roles.
3. Define your projects by clicking on **Edit Projects** from the Main Menu. Click the Add New Project button to define your own project. You may add as many projects as you need. After a new project has been added, you may assign users to it. If the users for this project are not yet defined, you may link the project after you create the user profiles.
4. Define your users by clicking on **Edit Users** from the Main Menu. Click the Add New User button to define a new user profile. By default, an email will be sent to the user with their sign-in credentials, so be sure to enter their email address correctly.
5. Set your account options by clicking on **All Maintenance >> Edit Account Options**.
6. Update your account profile information by clicking on **All Maintenance >> Account Profile**.
7. Review and update the default drop-down choices by clicking on **All Maintenance >> Field Manager**. From the Field Manager, review the drop-down list values for each field.
8. Review and update your email notifications by clicking on **All Maintenance >> Set Email Notifications**, then review the email notifications for each project you have defined.
9. By turning off caching in your browser, you will be able to see the most recent version of the AdminiTrack application pages. This link (http://www.adminitrack.com/AboutBrowserCache.aspx) has instructions on turning off caching for common web browsers.

Getting Started for New Users

Sign In Page

Your account's AdminiTrack System Administrator has setup the following sign-in credentials for you:

- User ID (typically your email address)
- Account #
- Passcode

You should have received an email with your sign-in credentials. Memorize the account number and your passcode or store them in a very secure place. We suggest that you change your passcode as soon as you sign in for the first time.

You may retrieve your sign in credentials from the sign in page by clicking the **forgot my passcode** link.

To prevent users from having to sign in multiple times throughout the day, the Remember me on this computer checkbox is checked on the sign in page by default. This disables the automatic sign-out feature and will allow you to continue using AdminiTrack without the requirement to sign in again.

The Main Menu

The AdminiTrack application runs in frames, so the left side of your page will always display your available menu options. These menu options make getting around AdminiTrack very easy. The options are divided into logical areas. Some options may not be available based on your permissions as set by your system administrator. Depending on your browser, you can place your mouse pointer over a menu option and descriptive text at the bottom of the menu will provide more information about that option.

Issues List

The Issues List page is the first page you will see after signing in to AdminiTrack. This list shows all of the current issues in the system and is where you will typically spend most of your time. From here, you can filter your issues by project and other helpful criteria. This helps you find those issues that are important to you. You can quickly add new issues or edit existing issues in the list.

Paging

The paging buttons are always visible in the top left area of the Issues List. You can also go directly to any page by clicking the page number.

Filters

The top section of the page has four drop-down lists (Status, Assigned To, Project, Show) which allow you to quickly filter the list. Click the Apply Filters button on the right to run the filter. These values are "sticky", meaning that your filter settings will be maintained, even across sign-ins.

Browser Cache Settings

By turning off caching in your browser, you will be able to see the most recent version of the AdminiTrack application pages. This link (http://www.adminitrack.com/AboutBrowserCache.aspx) has instructions on turning off caching for common web browsers.

Remember Me On This Computer

AdminiTrack can end your user session after a predefined period of inactivity. If you attempt to access the application after this period, you will be required to sign in again. This is for security purposes and to conserve server resources. Most other web applications force this condition, and you do not have an option to turn it off.

AdminiTrack provides an alternative. To prevent users from having to sign in multiple times throughout the day, the **Remember me on this computer** checkbox is checked on the sign in page by default. This disables the automatic sign-off feature and will allow you to continue using AdminiTrack without the requirement to sign in again. This will only last as long as your browser is open. If you close your browser, you will need to sign in again.

You may uncheck this checkbox before signing in to re-enable the automatic sign-off feature for additional security. However, you will be required to sign in again anytime you do not use the application for a predetermined amount of time.

Disabling the automatic sign-off feature makes AdminiTrack easier to access throughout the day, but you should always take all security precautions regardless of the setting. AdminiTrack strongly recommends that you always sign out and close your browser when you leave your workstation to prevent someone from accessing your AdminiTrack account while you are away. This is especially true if you have **Remember me on this computer** unchecked since your session will not automatically timeout.

Working with the Issues List

The Issues List provides a high-level view of the issues. To see the details of any single issue, click the View link (in the orange box) or the Brief Description field to go to the View Issue page. The View Issue page is where you go to view all the information about an issue. From here, you can see detailed descriptions, steps to reproduce the issue, and all the characteristics of the issue, including comments by other team members. You will also be able to send others an email about the issue, look at any files attached to this issue, as well as your own private notes.

A paper clip icon next to an issue indicates that it has one or more attachments. You can click the paper clip to jump to the View Issue page.

A binoculars icon next to an issue indicates that the issue is in your Watch List. Your Watch List is any group of issues that are important to you or you want to group together in a single list. The Watch List allows you to view them together in one list by selecting *Issues I am Watching* from the Show filter.

To add issues to the Watch List

1. Click the checkbox to the left of each issue
2. Click the drop down list *Choose Action for selected issues*.
3. Select *Add selected Issues to Watchlist*.
4. Click the **Go** button next to the list.
5. Binoculars appear next to any issue that is currently in your Watch List.

To view the issues in your Watch List

1. Select *Issues I am Watching (Watch List)* from the Show filter.
2. Click the **Go** button next to the Show filter.

To remove issues from the Watch List

1. Click the checkbox to the left of each issue
2. Click the drop down list *Choose Action for selected issues*.
3. Select *Remove selected Issues from Watchlist*.
4. Click the **Go** button next to the list.

Click the **Choose Columns** link to select up to 20 issue fields to display in your Issues List. Issue ID, Brief Description, and O/C (open/closed) columns always display. Your choices will remain until you change them.

Click the **Export** link to export the current list of issues.

Click the **Print** link to print the current list of issues.

I did not receive my credentials when my account was created

Send an email to support@adminitrack.com and include the email address you used to start your account if it differs from the one you are using. Also include your account number if you know it. Our staff will send you your credentials along with instructions on how to sign in.

It is not uncommon for email servers to block our notifications thinking they are SPAM. Please contact your ISP or corporate email server administrator and ask them to add AdminiTrack's domain or IP as a "trusted source". This will allow emails coming from us to reach you while continuing to protect against unknown sources. AdminiTrack's Terms of Service requires that your email addresses can readily accept email notifications both for maximum benefit to you and to ensure we can reach you. This link (http://www.adminitrack.com/AboutBlockedNotifications.aspx) has additional information your email administrator can use to resolve any blocked emails.

Issue Maintenance Topics

Adding a Comment to an Issue

To add a comment to an issue:

1. Click the Add Comment button on the View Issue page.
2. On the Add/Edit Comment page, enter any comments you have for this issue here. Your comment may be up to 4000 characters in length. Your comments will appear on the View Issue page along with any other comments submitted by you or others.
3. To save the comment, click one of the following buttons:
   - **Save & List** - to save your comments and return to the Issues List page
   - **Save & View** - to save your comments and return to the View Issue page
   - **Cancel** - return to the page you came from without saving the comment

   See "Editing or Deleting a Comment" on page 28

Adding a Linked Issue

To add a new linked issue (Issue ID # known) to the current issue:

1. Click on the **Link Issue** button on the View Issue page for the current issue.
2. On the Link Issue page, enter the Issue ID number of the issue to be linked in the field "Link Issue #".
3. Select the relationship from the drop-drown list (parent, sibling, child)
4. Click the **Link Issue** button.
5. The newly linked issue will appear in the Issues Linked list.

If you do not know the Issue ID number of the issue you wish to link to, you may use the search feature on the Link Issue page:

1. Click on the Link Issue button on the View Issue page for the current issue.
2. On the Link Issue page, type a word or short phrase in the **Search text** text box.
3. Click the **Search** button.
4. If the target issue appears in the search results, click the appropriate relationship name (sibling, parent or child) next to the target issue.
5. The target issue will now appear in the Issues Linked list.

See "Removing a Linked Issue" on page 29

See "Understanding Linked Issues" on page 39

Adding a New Issue

To add a new issue

1. Click the **Add New Issue** button on the Issues List page or on the View Issue page.
2. Enter values or select options for all required fields, which are marked with an asterisk (*).
3. Verify that you have selected the correct **Project** along with other values.
4. Click the appropriate button:
    - **Save & New** - to save this issue and open up a new Add Issue form to add another issue.
    - **Save & List** - to save this issue and return to the Issues List page.
    - **Save & View** - to save this issue and return to the View Issue page.
    - **Save & Attachments** - to save the issue and add attachment(s). Since the issue will be saved first, required fields must be entered before attaching files.
    - **Cancel** - to leave this form without creating a new issue.

Helpful Hints

- The **Brief Description** field must be filled in; however, we recommend using the Full Description field to enter as much detail as possible about the issue.
- Use the **Steps to Reproduce** field to record how to locate or reproduce a defect or problem.
- You may assign the issue to someone by choosing a user from the **Assigned To** drop-down list box. Only users who are associated with this issue's project will appear in the list.
- The **Estimated Completion Date** field specifies a valid date when this issue is expected to be resolved. This same field may also be set on the **Resolution of Issue** page.
- To add an issue attachment, you may click the **Attachments** button. The issue will be saved first, so required fields must be entered before attaching files. Attachments may also be viewed and entered from the View Issue page using the Attachments tab.

Assigning or Re-assigning an Issue

An issue may be **assigned** to a specific user or **unassigned** (not assigned to any particular user). An assigned user is typically responsible for the issue. You may use this form to assign or re-assign an issue to someone, or un-assign it (issue is not currently assigned to any user). Issues may also be assigned using the **Add/Edit Issue** form if you have authority.

1. To assign, re-assign or un-assign an issue to another user:
2. Click the Assign Issue button on the View Issue page.
3. On the Assign Issue page, you may select either one of the following from the Assign Issue To listbox.
    - To assign the issue: Select the appropriate user, or
    - To un-assign the issue: Select **Set to Unassigned.**
4. You may also add an optional comment. The comment will be added to the Comments and History section for this issue and will be included in notification emails. This allows you to add a note for the new assignee at the time of assignment and not as an additional step.
5. Click the **Assign Issue** button.

To assign one or more issues from the Issues List page: See "Assign Issues in Batch" on page 21

Notes

- You may update the **Status** from this page as well.
- The Assign Issue page shows the user who is currently assigned this issue or displays **Unassigned** if no one is currently assigned to the issue.
- Only users who are associated with this issue's project will appear in the **Assign Issue To** list.
- You may also un-assign the issue by selecting the **Set to Unassigned** option in the **Assign Issue To** list box. This option will only appear if the issue is not currently unassigned.
- Users will be automatically notified by email when they are assigned an issue unless they have chosen to not receive this type if email notification in their personal preferences page.

Assign Issues in Batch

To assign one or more issues from the Issues List page:

1. Click the checkbox next to one or more issues on the Issues List page and select **Assign selected Issues** from the *Choose Action for selected issues* drop-down list above the column headings and then click the Go button to the right.
2. The Assign Selected Issue(s) page displays the issue number as well as the brief description to ensure that you are assigning the correct issue(s). Use this form to assign/re-assign/un-assign each of the issues by selecting the appropriate user name under the New Assignee column.
3. You may also add an optional comment. The comment will be added to the **Comments and History** section for each of the issues and will be included in notification emails. This allows you to add a note for the new assignee at the time of assignment and not as an additional step.
4. Click the **Assign & Save** button.

Change Issue Status in Batch

To change the status of one or more issues from the Issues List page:

1. Click the checkbox next to one or more issues on the Issues List page and select **Change Status of selected Issues** from the *Choose Action for selected issues* drop-down list above the column headings and then click the **Go** button to the right.
2. The Change Status of Selected Issues page displays the issue number, project name, brief description, Assigned To name and current issue status. Use this form to change the status of each of the issues by selecting the appropriate status name under the New Status column.
3. You may also add an optional comment. The comment will be added to the **Comments and History** section for each of the issues and will be included in notification emails. This allows you to add a note regarding the change in issue status that applies to all selected issues.
4. Click the **Change & Close** button.

Change Project in Batch

The Change Project of Selected Issues page displays the issue number, current project name, brief description, issue status, and Assigned To name. To move one or more issues from one project to another from the Issues List page:

1. Click the checkbox next to one or more issues on the Issues List page and select **Change Project of selected Issues** from the *Choose Action for selected issues* drop-down list above the column headings and then click the **Go** button to the right.
2. Select the Target Project from the drop-down list box.
3. You may also add an optional comment. The comment will be added to the **Comments and History** section for each of the issues and will be included in notification emails. This allows you to add a note regarding the change in project that applies to all selected issues.
4. Click the **Change & Close** button.

Cloning an Issue

Cloning (duplicating) an issue allows you to create a new issue from an existing one. This is useful when you need to create a new issue that represents a different problem, but is similar to an existing one.

To clone an issue:

1. Open the **View Issue** page for the issue you want to clone.
2. Click the **Clone Issue** button.
3. Check the appropriate boxes to optionally:
    a. Clone the issue's comments
    b. Clone the issue's attachments
    c. Link the cloned issues together as siblings
    d. Retain original creation date/age
4. Click the **Clone Issue** button.

Closing an Issue

The Close Issue page displays the issue number as well as who created the issue (and their role) plus other summary information to ensure that you are closing the correct issue. To close a single issue from the View Issue page:

1. Click the **Close Issue** button on the View Issue page of the issue you wish to close.
2. From the Closed Status drop-down list, select the appropriate status.
3. Click either the **Close Issue & View** button to close the issue and return to the View Issue page or click the **Close Issue & List** button to close the issue and return to the Issues List page.

To close one or more issues from the Issues List page: See "Change Issue Status in Batch" on page 22

Deleting Issues

To delete an issue from the View Issue page

1. Click the **Delete Issue** button.
2. You will be prompted to confirm that you would like to proceed with deleting the issue. Click **OK** to continue with deletion.

If the Delete Issue button is not enabled, your user role does not permit you to delete issues. Please contact your local system administrator for assistance.

To delete one or more issues in batch:

1. Select the appropriate issue(s) from the Issues List by clicking the checkbox.
2. Select the **Delete selected Issues** option from the drop-down list *Choose Action for selected issues*.
3. Click the **Go** button to the right.
4. On the Delete Selected Issues page, the selected issues are listed. Please review carefully and click the **Delete & Close** button to **permanently** remove the issues from the database.

If you wish to delete closed issues, first make sure that the account option for Edit Closed Issues is set to Yes.

WARNING: Deleted issues cannot be recovered. They are permanently removed from the database. Please use this option with extreme caution.

Editing an Existing Issue

To edit an existing issue:

1. Click the **Brief Description** or the **Edit** link for that issue on the Issues List page, or click the **Edit** Issue button on the View Issue page.
2. Enter or change values or select options for all required fields, which are marked with an asterisk (*).
3. Verify that you have selected the correct **Project** along with other values.
4. Click the appropriate button:
    - **Save & New** - to save this issue and open up a new Add Issue form to add another issue
    - **Save & List** - to save this issue and return to the Issues List page
    - **Save & View** - to save this issue and return to the View Issue page
    - **Save & Attachments** - to save the issue and add attachment(s). Since the issue will be saved first, required fields must be entered before attaching files.
    - **Cancel** - to leave this form without creating a new issue.

Helpful Hints:

- If your user role permits, you can change the **Issue Status** here from **(Open)** to **(Closed)**.
- You may re-open a closed issue if your account permits editing of closed issues and you have authority. You can change the Issue Status from **(Closed)** to **(Open)**. All resolution information for this issue will remain.

Editing or Deleting a Comment

To edit an existing comment in an issue:

1. From the View Issue page, scroll down to the Comments and History section and click the **Edit** link next to the comment you wish to edit.
2. Edit the text in the Comment column.
3. Click the **Save** link.

To delete an existing comment in an issue:

1. From the View Issue page, scroll down to the Comments and History section and click the **Delete** link next to the comment you wish to delete.
2. A pop-up message box will ask you to confirm deletion.
3. Click the **OK** button to continue with deletion.

Notes:

- **System** comments (indicated as such in the Type column) are for audit trail purposes and cannot be deleted.
- **User** comments may be edited or deleted if you have appropriate permissions. Please contact your local System Administrator if you have questions regarding this feature.

Removing a Linked Issue

To remove an existing relationship to an issue:

1. On the View Issue page for the current issue, click the **Link** Issue button.
2. On the Link Issue page, click the relationship link (parent, child, sibling) in the Relationship column for the appropriate issue in the *Issues Linked To Issue #* table.
3. The linked issue will disappear from the list.

Re-opening a Closed Issue

To re-open a closed issue (Issue State is Closed) from the View Issue page:

1. Open the **View Issue** page for the issue in question.
2. Click the **Re-open Issue** button on the View Issue page. This button will only be visible if the issue you are viewing is currently closed.
3. The Re-Open Issue page displays the issue number as well as who created the issue (and their role) plus other summary information to ensure you are re-opening the correct issue (i.e., changing the Issue Status from Closed to Open.)
4. Select the appropriate status from the Open Status drop-down list.
5. To re-open the Issue, click either
    - The **Re-Open Issue & View** button to re-open the issue and return to the View Issue page, or
    - The **Re-Open Issue & List** button to close the issue and return to the Issues List page.

You may also re-open an issue by changing the Issue Status from Closed to Open using the Edit Issue page:

1. Click the **Edit Issue** button from the View Issue page or the Edit Issue link from the Issues List page to go to the Edit Issue page.
2. Select an Open status from the Status drop-down list.
3. Click either the **Save & New** or **Save & List** buttons.

Resolving an Issue

The Resolution of Issue page displays who created the issue (and their role) and a brief description of the issue. You may use this form to record information pertaining to how the issue was resolved.

To resolve an issue:

1. Open the View Issue page for the issue you wish to resolve.
2. Click the **Resolution** button.
3. Enter/edit fields as needed.
4. Click the appropriate **Save** button.

Note: Mark the **Resolved** checkbox to indicate the issue is resolved. This is necessary to trigger email notification when *any Issue is Resolved* or *any Issue I Created is Resolved*.

Editing Closed Issues

On the Edit Closed Issues page, Administrators may lock-down closed issues so they cannot be edited. This option is often used by teams where tighter controls over Closed issues is required.

To change this option:

1. Click **All Maintenance >> Edit Account Options**
2. In the Allow Editing of Closed Issues section, click the **Edit** link.
3. For the Allow Editing of Closed issues checkbox:

- If **Checked (Yes)**, Closed issues (Current status is a Closed status) can be modified by anyone with the appropriate permissions. This is the default setting. The issue can be edited, deleted, assigned, closed, and resolved by anyone with the appropriate permissions.
    - Users can edit closed issues.
    - Users can edit their own comments for open and closed issues.
    - There are no security permissions regulating add/edit/delete of general comments.
    - Users cannot edit system-generated comments. This feature is in effect regardless of this account option setting. System comments must be locked down to maintain the integrity of the audit trail.
    - Attachments can be added, edited or deleted.
- If **Unchecked (No)**, once an issue is closed - Issue Status = **(Closed)** - no modifications can be made by anyone, except for Administrators.
    - The Edit link is disabled on the Issues List page.
    - The following buttons are disabled on the View Issue page: Edit Issue, Add Comment, Assign Issue, Resolution, Delete Issue, Close Issue. Other buttons may be disabled depending on your role permissions.
    - User comments cannot be added, edited or deleted.
    - Users cannot edit system-generated comments. This feature is in effect regardless of this account option setting. System comments must be locked down to maintain the integrity of the audit trail.
    - Attachments cannot be added, edited, or deleted.
    - Batch actions (assign, delete, close) cannot be performed from the Issues List page.

Note: If you would like to edit or re-open a closed issue, you must either be an Administrator or ask an Administrator to change the account setting.

View Issue

The View Issue page provides detailed information for an issue. You may navigate to this page by clicking on the Brief Description of an issue or the View link from the Issues List page.

Apart from the first three navigation buttons listed below, the following buttons may or may not be visible depending on the permissions associated with your user role.

Button	Description
Issues List	Takes you to the Issues List page
Prev	Navigates to the previous issue in the current list
Next	Navigates to the next issue in the current list
Add Issue	Opens the Add Issue page to add a new issue
Edit Issue	Opens the Edit Issue page to edit this issue
Add Comment	Inserts a new comment into the comments list of an issue
Assign Issue	Assigns or re-assigns the issue to another user
Link Issue	Links this issue to one or more other issues
Clone Issue	Creates a new issue as a clone of this one
Resolution	Updates resolution items and resolves the issue
Close Issue or Re-Open Issue	Sets the Issue Status to Closed or Open, respectively
Delete Issue	Deletes the issue. This action is permanent.

Two links are displayed below the buttons.

Link	Description
Watch This Issue	Adds the issue to the **Issues I am Watching** filter
Print	Prints the issue

The following high-level information is presented in the next section.

Field Name	Description
Issue Number	Unique identifier assigned by the system
Issue Status	Open or Closed
Project	Name of Project pertaining to the issue
Assigned To	Name of user to whom this issue is assigned
Brief Description	Description of the issue
Full Description	Longer description of the issue, if provided
Steps to Reproduce	Description of how to replicate problem, if provided
Linked Issues	You also have the ability to link issues together. If the issue you are viewing is linked to other issues, those issue ID numbers will appear here. The linked issues will be categorized depending on how they are linked - as a sibling, parent or child relationship.

Tabs

Tab name	Description
Detail	Shows detailed information for this issue including resolution information, comments and history. Because the Project name and User names are hyperlinks, you may click on these links to open up a window with more information on that item.
Notify Now for this Issue	Provides a quick way to send other users a one-time email about this issue.
Attachments	Lists all files attached to this issue. You can also attach new files. A number next to the label indicates how many files, if any, are currently attached to this issue.

Tab name	Description
Private Notes	Contains notes on this issue that are private to you. A small icon will be visible on the Private Notes tab if any notes are stored for this issue

General Comments and History

The last section on the Detail tab is General Comments and History. This provides a reverse chronological listing of all user comments and important changes to the issue and serves as an audit trail over the life of the issue. There are two types of comments: (1) system, which are not editable, or (2) user, which may be edited or deleted depending on the user's role. Comments may be sorted by clicking on the column header.

The Issues List

The Issues List is the first page you will see after signing into AdminiTrack and is where you will spend much of your time.

The following columns are always present on the Issues List by default:

Column	Description
	Mark multiple issues for batch processing by clicking on checkmark icon.
ID #	Unique numeric identifier for the issue (Issue ID)
A	A paper clip icon indicates that the issue has one or more attachments.
W	A pair of binoculars indicates that the issue is on the Watch List.
O/C	Indicates whether issue is Open (O) or Closed (C)
Brief Description	Short description of the issue

Features include:

Filters - The top section of the page has four drop-down lists which allow you to quickly filter the list. Click the **Apply Filters** button on the right to run the filter.

- **Project** allows you to see all projects or only a single project. All projects that you have authority to view will be available in the list.
- **Status** allows you to quickly show only those issues that are assigned to a specific status (Open or Closed).
- **Assigned To** allows you to see issues based on to whom they are assigned to.
- **Show** allows you to select a pre-defined search filter. There are standard filters and custom filters, which you define.
- Clicking the **Manage Custom Show Filters** link displays a maintenance page for editing existing custom filters or creating a new one.

Edit or View an Issue - You have the option to edit or view a particular issue. Clicking on the description of the issue allows you to view the issue or you can click the Edit link next to each issue to go directly to the Edit Issue page.

Issues with Attachments - Issues may have one or more files attached to them. Issue attachments may be any type of file. Any issue with at least one attachment will have a paper clip icon appear next to it. Click on the paper clip icon to jump to the View Issue page showing the attachments list for this issue.

Choose Columns to Display - Click on the **Choose Columns** link (located directly above the Issues List grid) to select which columns you would like to appear in the Issues List page. Your choices you make here will be maintained until you change them. You may choose up to 20 columns to display in the list. Issue ID and Brief Description always appear by default.

Bidirectional Sorting - You may sort any column by clicking on the column heading. The first click will sort ascending and a subsequent click on the same column will reverse the order to sort descending. Note that some columns such as Priority and Severity will sort on their explicit sort values defined in their record and not alphabetically as most other columns. This is because these columns have an intrinsic sort value. For example, Priority makes more sense to sort as Low, Medium, High rather than alphabetically.

Watching Issues - You can choose to have any issue show up in the Show filter *Issues I am Watching (Watch List)*. This permits you to group any set of issues that are important to you.

- Add issues to your watch list by selecting them in the Issues List (click the checkbox next to an issue ID number to select it) and then clicking the *Add selected to Watchlist* option from the **Choose Action for selected issues** drop-down list. Any issue being watched will have binoculars appear next to it in the list.
- View all of your watched issues by clicking on the **Show** drop-down list and choosing *Issues I am Watching*. This will display all of the issues you are currently watching.
- Remove issues from your watch list by first choosing the *Issues I am Watching* option from the **Show** drop-down list. Then select one or more issues and click the *Remove selected from Watchlist* option from the **Choose Action for selected issues** drop-down list.

To add issues to the Watch List

1. Click the checkbox to the left of each issue
2. Click the **Choose Action for selected issues** drop down list.
3. Select **Add selected Issues to Watchlist**.
4. Click the **Go** button next to the list. Binoculars will appear next to any issue that is currently in your Watch List.

To view the issues in your Watch List

1. Select **Issues I am Watching (Watch List)** from the Show filter.
2. Click the **Go** button next to the Show filter.

To remove issues from the Watch List

1. Click the checkbox to the left of each issue
2. Click the **Choose Action for selected issues** drop down list.
3. Select **Remove selected Issues from Watchlist**.
4. Click the **Go** button next to the list.

You can also choose to "watch" or "stop watching" an issue when viewing it from the View Issue page.

Page Navigation- If there are more issues than are shown on the current page, you may navigate to other pages using the page number links.The number of issues that display per page are set to 50 by default. You may change this value, which ranges from 10 to 300, by clicking on **My Preferences >> Application Settings**.

Add New Issue button - Click to add a new issue.

Links directly above the Issues List grid provide additional options.

- **Export** - To export current issues list to Excel file.
- **Print** - Print the list of issues (current page only) to the printer. (Use Reports List on the Main Menu for more ways to print issues.)

Permanently Delete Issues - If you have authority, you may delete one or more issues by selecting them and clicking the **Delete selected Issues** option from the **Choose Action for selected issues** drop-down list. Then click the **Go** button to the right.

WARNING: Deleted issues cannot be recovered. They are permanently removed from the database. Please use this option with extreme caution.

Choose Columns in Issues List

You may select up to 20 issue columns to display in the Issues List grid by clicking the Choose Columns link on the Issues List.

1. Click the **Edit** link to replace an existing field with a new field or swap places with an existing field.
2. Click the **Remove** link to remove a field from the Issues List.
3. Select a field from the Choose Columns drop-down list and click the **Add Column** button to add that field to the Issues List.

Understanding Linked Issues

Linking issues together is useful if you have two or more issues entered that represent a single problem or defect, or if two issues are separate problems, but you want to track them together. Linked issues remain as separate and distinct entities, but you can quickly locate the associated issues and refer to them when needed. Another use of linking is when you have some issues that are logically subordinate to another issue. These types of relationships may be tracked using linking.

Link Type	Description
Sibling	Links together two issues of equal importance or representing the same or similar problem or project issue.
Parent	Links the new issue as a parent to the current issue. The parent issue is visually and logically super-ordinate to the current one.
Child	Links the new issue as a child to the current issue. The child issue is visually and logically sub-ordinate to the current one.

On the View Issue page, if the issue is linked to other issues, the linked issue numbers will appear below the description fields in the View Issue header section. You can quickly jump between linked issues by clicking on the links and immediately viewing that issue. Each issue ID number will appear next to the type of link it represents such as Parent, Sibling or Child.

Links are created and removed from the Link Issue page. From the View Issue page, click the Link Issue button to go to the Link Issue page. This page allows you to locate and link other issues to the current issue. From this page you can:

- Review the description of the current issue
- View the relationships between existing linked issues
- Remove existing linkages by clicking the relationship hyperlink under the Relationship column
- Add a new linked issue by entering the issue ID number for the other issue
- Add a new linked issue by performing a sub-string search for the other issue

User Maintenance Topics

Maintain Users

The Maintain Users page is the central location for managing users and includes basic information about user activity. Your account's System Administrator, listed in bold text, cannot be deleted as a precautionary measure. If you need to transfer control of system administrator privileges to another user, go to **All Maintenance >> Reassign System Administrator**.

Column	Description
First Name	User's first name
Last Name	User's last name
Role Name	User's role
Active	If Yes, user can sign-in to AdminiTrack; No, otherwise.
#Sign-ins	Number of times the user has signed in to AdminiTrack since their profile was created.
Last Sign-in (days)	Number of days since the user last signed in
Projects	Click the **Link to Projects** hyperlink to assign the user to projects

Other links

- **Edit** - Click this hyperlink to edit the user profile.
- **Delete** - Click this hyperlink to delete the user profile. This is only applicable to users who are not referenced

To **add** a new user

- Click the "Add New User" button in the top left corner of the frame

To **search** for a user

- Enter in the search text in the textbox labeled "Search by Name". The First and Last Name fields will be searched.
- Then click the Search button to see the results. Click the Clear button to reset the page.

To **hide** inactive users in the listing

- Mark the "Hide Inactive Users" checkbox

Statistics on number of inactive and active users:

- If Hide Inactive Users checkbox is not marked, the number of inactive and active users is displayed next to the total number of users.
- If Hide Inactive Users checkbox is marked, only the number of active users is displayed.

To **reinvite** all users who have never logged in:

- Click the **Reinvite All** link in the top left corner of the frame. Sign-in credentials will be sent to all users who have never signed in.

Sorting

- Click on the column heading you wish to sort by.

Adding a New User

To add a new user to the system:

1. Click **Edit Users** on the Main Menu.
2. Click the **Add New User** button.
3. Enter the information for the new user.

Column	Description
First Name	User's first name
Last Name	User's last name
Email Address	User's email address
User ID	The username to sign in to AdminiTrack. Typically, it is the user's email address.
Role	User's role
Passcode	Passcode to gain access to AdminiTrack. Passcode must be at least 8 characters in length, with at least one capital letter (A-Z) and one numeric character (0-9).
Verify Passcode	Enter the passcode again for verification
Active	If checked, user can sign in to AdminiTrack. If unchecked, user cannot sign in.
Phone	User's phone number
Fax	User's fax number

The *Use Email* button will copy the user's email address into the User ID field.

You may create a passcode by either entering one or clicking the *Generate Passcode* button. If you are editing an existing user profile and do not want to change the passcode, leave the passcode fields blank.

4. Click the **Save & Link Projects** button to link projects to the user. Click the **Save & Close** button if you do not need to link projects to the user.

To link projects to a user at any time: From the Maintain Users page, click the **Link to Projects** hyperlink (under the Projects column) for the appropriate user in order to associate projects with the user.

Notes

- You may add as many users to your account as you need.
- Each user profile represents a single user ID and has a unique identity within your account.
- When user profiles are created, each user is emailed an invitation to sign-in to the application. The email contains their user credentials and explains that they have been given access to the application.
- A user may be marked inactive at any time, in which case the user may no longer sign-in and their name will not appear in drop-down lists, for example, to be assigned an issue. Marking a user inactive is appropriate for those who are between projects or have left your company. They can be reactivated at any time by marking the Active checkbox and saving the change.
- You may delete a user if their name is not referenced elsewhere in the application, such as linked to project(s), referenced in issue(s), etc.
- If you attempt to delete a user that is referenced in one or more issues, the system will automatically mark the user as Inactive. This will allow their names to continue to show up in reports and preserve an accurate audit trail of work performed.
- If attempt to delete a user that is referenced in one or more projects, the system will display a warning message saying the user cannot be deleted and to mark the user as Inactive. The user will not be automatically marked Inactive.

- There are no restrictions against multiple users sharing a single user account. However, users may experience differences in preferences when sharing an account. In addition, only one email address may be specified per user account.
- On the Maintain Users page, users who have never signed in will display **Never** with a small **Reinvite** link below it in the column labeled **# Sign-ins**. Simply click this link and the system will send this user another invitation to sign-in to AdminiTrack and join your team.
- On the Maintain Users page, the default setting shows all users, active and inactive. If you prefer to hide the inactive users, click the Hide Inactive Users checkbox.

Editing an Existing User

To edit an existing user:

1. Click **Edit Users** on the Main Menu.
2. Click the **Edit** link next to the user profile you wish to edit.
3. Update the information for the new user.
4. Click the **Save & Close** button to save the information or the **Cancel** button to leave without saving. If you need to link projects to the user, click the **Save & Link Projects** button.

Notes:

- You may change the passcode by either entering one or clicking the **Generate Passcode** button. If you are editing an existing user profile and do not want to change the passcode, leave the passcode fields blank.
- A user may be marked inactive at any time. The user may no longer sign in and their name will not appear in drop-down lists, for example, to be assigned an issue. Marking a user inactive is appropriate for users who are between projects or have left your company. They can be reactivated at any time by marking the Active checkbox and saving the change.

See "Deleting or Inactivating Users" on page 45

Deleting or Inactivating Users

We strongly recommend that users never be deleted in order to maintain the integrity of the audit trail. Users should inactivated, instead of deleted, so that you may reactivate them later, if needed.

A user may be permanently deleted **only if** the user is not referenced elsewhere in the system (projects, issues, etc.).

To mark the user as inactive:

1. Click **Edit Users** from the Main Menu.
2. On the Maintain Users page, click the **Edit** link next to the user's name.
3. On the Edit User page, uncheck the Active checkbox.
4. Click the **Save & Close** button.

The advantage of this option is that the true historical accuracy of your issue history is preserved. This user's name will still display in reports and pages where appropriate, while the user is effectively removed from further participation in the application and cannot be assigned issues, etc. In addition, the user account can be reactivated at any time by editing the user's profile and checking the Active checkbox.

To permanently delete the user (only permitted if the user is not referenced elsewhere in the system):

1. Click **Edit Users** from the Main Menu.
2. On the Maintain Users page, click the **Delete** link next to the user's name. This user will be permanently deleted and cannot be recovered.

Link Projects to User

You may reach this page by clicking the **Link to Projects** link for the appropriate user on the Maintain Users page.

To add or delete projects:

1. Link projects to the user by selecting the project(s) in the **Available Projects** listbox on the left and clicking the **Move >>** button to move the selected project(s) into the **Linked Projects** listbox. To delete projects, select projects in the Linked Projects listbox and click the **<< Move** button to move the selected projects back to the Available Projects listbox.

You can select a range of projects by clicking on one project, then click another while holding down the Shift key. You can select multiple projects by holding the Ctrl key while clicking the projects' names.

2. Click the **Close** button to exit.

Project Maintenance Topics

Maintain Projects

The Maintain Projects page is the central location for managing projects. A project is a defined set of activities and tasks. For example, a project could represent a single software system or application.

Column	Description
Project Short Name	Name of project
Active	If Yes, project will appear in drop-down lists; No, otherwise.
Users in Project	Click the Link Users to Project hyperlink to add users to the project

Other links

- **Edit** - Click this hyperlink to edit the project information.
- **Delete** - Click this hyperlink to delete the project. This is only applicable to projects who are not referenced elsewhere in the system (i.e., issues). If the project cannot be deleted, the system will mark it as inactive.
- **Clone** - Click this hyperlink to make a copy of the project. The new project will be named **Copy of** *original name* and should be re-named. All project information and assigned users will be copied over to the new project.

To **add** a new project

- Click the "Add New Project" button in the top left corner of the frame

To **hide** inactive projects in the listing

- Mark the "Hide Inactive Projects" checkbox

Statistics on number of inactive and active projects:

- If Hide Inactive Projects checkbox is not marked, then the number of active and inactive projects is displayed.
- If Hide Inactive Projects checkbox is marked, then only the number of active projects is displayed.

Adding a New Project

All issues are tied to a **Project**. A project typically represents a single software application, but can represent whatever you wish.

To add a project:

1. Click on **Edit Projects** from the Main Menu. (You can also click All Maintenance >> Edit Projects in the Account Maintenance section.)
2. Click the **Add New Project** button.
3. Fill in the details for the project on the Add Project page. The only required field is the Short Name for the project.
    a. **Auto-Assign all Lookup Choices to this Project** checkbox: Mark this checkbox to automatically assign all lookup values to this project.
4. Click the **Save & Link Users** button to link users to your project. Click the **Save & Close** button if you do not need to link users to your project.

To link users to your project at any time: From the Maintain Projects page, click the **Assign** hyperlink (under the Users column) for the appropriate project in order to associate users with the project.

Note: The most important part of adding a project is to select the users you would like to be associated with the project. If a user is not associated with a project, he or she will not be able to see any issues for that project.

Cloning an Existing Project

When an existing project is cloned:

1. All users and notifications will be copied into the new project.
2. The new project will be named **Copy of** *original name*. You should rename the project as necessary.

To clone an existing project:

1. Click on **Edit Projects** from the Main Menu.
2. Click the **Clone** link next to the project you wish to clone.
3. A popup message will ask you to confirm that you want to clone the selected project.
4. Click **Yes** to proceed, or No to cancel.
5. The cloned project with the name **Copy of** *original name* will now appear in the Projects list.
6. To re-name the project, click the **Edit** link next to the cloned project.

Deleting Projects

Typically, administrators will choose to mark projects as inactive instead of deleting them permanently. This prevents users from choosing the project in a list and from viewing the issues in the project. Issues from inactive projects are available for future reference. We always recommend marking a project inactive rather than deleting, because you can reactivate the project at a later time, if needed. If you attempt to delete a project that is referenced in one or more issues, the system will automatically mark the project as "inactive".

A project can be deleted only if it has not been referenced in one or more issues.

To deactivate a project:

1. Click on **Edit Projects** from the Main Menu.
2. On the Maintain Projects page, click the **Edit** link next to the name of the project you wish to deactivate.
3. Uncheck the **Active** checkbox on the Edit Project page.
4. Click the **Save** button.

To delete a project which has never been referenced in an issue:

1. Click on Edit Projects from the Main Menu.
2. On the Maintain Projects page, click the Delete link next to the name of the project to permanently delete it.

Important: This action cannot be reversed.

Editing an Existing Project

To edit an existing project:

1. Click on **Edit Projects** from the Main Menu.
2. Click the **Edit** link next to the project you wish to edit.
3. Edit the details for the project on the Edit Project page. The only required field is the Short Name for the project.
4. Click the **Save & Close** button to save the information or the **Cancel** button to leave without saving. If you need to link users to the project, click the **Save & Link Users** button.

Link Users to Project

You may reach this page from the Maintain Projects page by clicking the **Link Users to Project** hyperlink.

To add or delete users:

1. Add users to the project by selecting the users in the **Unlinked Users** list box on the left and clicking the **Move >>** button to move the selected users into the **Linked Users** list box. To delete users, select users in the **Linked Users** list box and click the **<< Move** button to move the selected users back to the **Unlinked Users** list box.

You can select a range of users by clicking on one user, then click another while holding down the Shift key. You can select multiple users by holding the Ctrl key while clicking the users' names.

2. Click the Close button to exit.

Role Maintenance Topics

Roles and Permissions

Roles define the different responsibilities and permissions (authority to perform a certain action) that your users will have in the AdminiTrack system. Default roles include Administrator, Project Manager, Developer, Quality Assurance and User. You may add, delete or alter these roles as needed. AdminiTrack recommends that you modify existing roles or create new roles before adding new users. You may create as many roles as you need.

Important: You will not be able to delete a role once you have created users that are assigned to that role. AdminiTrack recommends that you carefully define your roles and authority levels prior to adding new users. You can rename the role or deactivate it (uncheck the Active check box on the Choices for User Role page) so that it may not be assigned to new users in the future. A role may only be deleted if no users are assigned to that role.

Permissions are authority levels. Each role defines a set of permissions that detail what actions a user assigned to that role may perform within AdminiTrack. When you assign a role to a user, they automatically inherit the permissions for that role. This makes it easy to ensure that users have the appropriate authority within the system and provides ultimate flexibility for determining who can do what within the application.

Example: You may permit QA staff or developers to assign an issue to a user, but not permit regular users or clients to do this. When you add a new developer to the system, you can assign them the role of Developer and you know they will have proper authority to perform their work but not be able to perform other functions such as close or delete an issue.

You may assign the permission of **Administrator** to any role. However, we suggest only assigning this to roles that have "Admin" in the role name so that you can easily identify users with this powerful permission. You should also limit this role to as few users as possible. Users who have a role with this permission will have global access to modify **all** areas of your account including access to all Users and Projects in the account via the permissions **Maintain Users & Roles** and **Maintain Projects**. These two permissions provide access to all Users and Permissions in the account regardless of which projects they are linked to.

System Administrator Role

A special role called the System Administrator contains a System Administrator flag and was initially given to the user who created your account. This privilege may not be edited or deleted and does not appear on the Edit Roles page. It provides full access to all areas of AdminiTrack. This privilege is for the user who serves as your primary account administrator and receives communications from AdminiTrack staff. Only one user in your account may possess this special System Administrator privilege. However, it is possible to transfer privilege other users by clicking on **All Maintenance >> Edit Account Options >> Reassign the System Administrator** and choosing a new user to reassign the privilege to. You must be the System Administrator or have the Admin permission assigned to your role in order to reassign this privilege to another user.

Important: Be very careful when setting permissions as some permissions may be suited only for administrative type roles. For example, the Maintain Users & Roles permission permits a user to not only add and delete roles themselves, but more importantly, to increase their own authority while reducing the authority and access to others. This type of permission should be limited to administrative type roles such as Administrator or Super User. These types of powerful permissions are clearly marked with a red asterisk. These are only suggestions as you may assign any permission to any role you desire.

Important: Maintain Users and Maintain Projects permissions should only be granted to a particular user who may see all users and projects in your account. These two permissions provide access to all users and projects in the account, regardless of what projects they are linked to.

Adding a New Role

To add a new role:

1. Click the **Edit Roles/Perm** link from the Main Menu.
2. In the field labeled **Role Name**, enter the role name
3. Click the **Add New** button.
4. The newly added Role Name will now appear in the table.
5. To sort the list, click one of the following links directly above the table list:
    a. **Alphanumeric** - The table will be sorted alphanumerically by clicking this link
    b. **Manual** - This link takes you to the Manual Sort for Role Name Options page. You may re-order how the Role Names will display in a drop-down list. Select a single item and use the Move Up or Move Down buttons to sort the list. Click the Save & Close button to save your changes.
6. To assign permissions to a role, click the **Edit Permissions** link under the **Permissions** column in the role's row.
7. To assign report categories to a role, click the **Assign** link under the **Report Categories** column in the role's row.
    a. If you need to add or delete report categories, you may click the **Maintain Report Categories** link above the **Report Categories** column.

Editing an Existing Role

To edit an existing role:

1. Click the **Edit Roles/Perm** link from the Main Menu.
2. Click the **Edit** link next to the Role Name you wish to change.
3. Change the information as necessary.
4. Click the **Save** link to save your changes or click Cancel.
5. To edit the permissions associated with the role, click the **Edit Permissions** link under the **Permissions** column.
6. To edit the report categories associated with the role, click the **Assign** link under the **Report Category** column.
7. To sort the list, click one of the following links directly above the table list:
    a. **Alphanumeric** - The table will be sorted alphanumerically by clicking this link
    b. **Manual** - This link takes you to the **Manual Sort for Role Name** Options page. You may re-order how the Role Names will display in a drop-down list. Select a single item and use the **Move Up** or **Move Down** buttons to sort the list. Click the **Save & Close** button to save your changes.

Assigning Permissions to a Role

To assign permissions to a role:

1. Click the **Edit Roles/Perm** link from the Main Menu.
2. On the page Choices for User Role, click the **Edit Permissions** link under the **Permissions** column for the role to which you would like to assign permissions.
3. On the page Permissions for Role, mark the appropriate checkboxes to assign permissions to the role in question.

Note: When assigning the *Add Issue* permission to a role, you must also select the *Change Issue Status* permission; otherwise, the user will not be able to save a new issue, because the Status field is always required. Similarly, for the *Edit Issue* permission, you must also select the *Change Issue Status* permission if changing Issue Status is necessary.

4. Click the **Save & Close** button to save your changes.

About the System Administrator Role

The System Administrator Role is a special, permanent role that may not be deleted or edited. This role is initially assigned to the user who created the account. It provides full permission to all areas of the AdminiTrack application. Only one person may possess this role at a time, and it is independent of any new roles you create. It is automatically transferred to another user when they are assigned the System Administrator Role.

The person who created this AdminiTrack account became the System Administrator by default. The System Administrator always has full permissions (authority) to access and manage all aspects of this account, regardless of what role is assigned to them. This is the single most powerful user in the system. In addition, this user is automatically assigned as the corporate account contact person in the Help Desk page and may be contacted by other users for assistance. This user also serves as the contact person for communication and email notifications from AdminiTrack, Inc.

One user must be always be designated as the System Administrator and this user record may not be deleted. However, it is possible to transfer the privilege of System Administrator to another user by going to **All Maintenance >> Reassign System Administrator** and choosing a new user to reassign the privilege to. You must be the System Administrator in order to reassign this privilege to another user.

Assigning a new user as System Administrator will automatically give them the System Administrator role originally created for your account. You may change this user's role to another role, but they will retain the System Administrator flag in their user record and continue to have full permissions to all areas of the application. This is a safeguard so that Administrators may not lock themselves out of areas of the application accidentally.

My Preferences Topics

Application Settings

The Application Settings page is where you set your personal preferences.

To change your application preferences, perform the following steps:

1. Click **My Preferences** from the Main Menu.
2. Click on **Application Settings** under Preference Options.
3. Select the item or click the link for the setting you wish to change and click the **Save** button. Items that you may set here include:

   General Preferences:

Column	Description
Rows per page for the Issues List	You may determine the number of issues that appear on the main Issues List page when you first enter AdminiTrack. You may choose values ranging from 10 to 300 issues per page.
Quick Stats Default Page	The **Quick Stats** page provides either a personal or system wide view of issue statistics. You may set control the default tab that will appear when you click the **Quick Stats** link from the Main Menu.

Your Email Notification Settings

- Suppress notifications to me if I made the change
- Edit Email Notifications
- Edit Email Format Options

To suppress notification to yourself when the event was a result of your own action, check the checkbox labeled **Suppress notifications to me if I made the change**.

To have email notifications sent to yourself or others when specific events occur to an issue, click the **Edit Email Notification Events** link. This will take you to the Email Notification Event List page where you may view and edit email notifications.

To set how your notification emails will be formatted, click the **Edit Email Format Options** link.

Personal Info

The **Preferences - My Personal Info** page allows you to change your:

- First Name
- Last Name
- Email Address
- Phone
- Fax

To change your personal information:

1. Click on **My Preferences >> Personal Info**.
2. When the administrator added you as a user, they entered some basic information such as your name and email address. This form allows you to update this along with other contact information.

When you create an issue, you are listed as the creator of the issue. When someone clicks on your name, they are presented the information above along with your User Role. Keeping your personal contact information accurate is important in case someone needs to reach you.

Change Passcode

To change your passcode:

1. Click **My Preferences** on the Main Menu.
2. Click **Change Passcode** under Preference Options.
3. Enter your current passcode.
4. Enter your new passcode twice for verification. The passcode must be at least 8 characters in length, with at least one capital letter (A-Z) and one numeric character (0-9).
5. Click the **Change Passcode** button.

Notes:

1. You will receive an email confirmation of your passcode change.
2. You may change your passcode at any time.
3. It is considered good practice to periodically change your passcode to prevent unauthorized access of your account.

Email Notification Events

See "How do I change my email notifications?" on page 67

See "How to setup email notifications for a project" on page 68

See "View All Notifications Report" on page 70

Email Notification Format Options

Each user has some control over the format of their email notifications. The choices include receiving the email as plain text or in HTML format. In addition, the user may choose what information is presented in the subject line as well as the first section of the email body.

For example, the subject line may now contain various combinations of the Project Short Name, Brief Description, Issue ID # or the event that triggered the notification. In a similar manner, the user may choose which of these items are displayed in the first section of the email body.

To change your Email Notification Format Options:

1. Click **My Preferences** from the Main Menu.
2. Click on **Email Notification Format Options** under Preference Options.
3. Click the radio button next to your preferred format option (Plain Text or HTML).
4. Select your preferred combination of items you wish to appear in the subject line of the email.
5. Select the maximum number of characters that will appear in the subject line of your email. This value may need to be reduced for some email clients.
6. Select your preferred combination of items you wish to appear in the first section of the email.
7. Click the **Save** button to save your changes.

Email Notifications Topics

How do I change my email notifications?

AdminiTrack allows each user to set their own notifications. This allows each user to determine which types of events (new issue created, assigned to them, status changed, etc) they need to know about. Users can even choose to notify others as well and the application will always remove duplicates should the other user already have subscribed to the same event.

Notifications can be different for each project as well. This allows a user who is working in an active project each day to reduce their email notifications for that project. On the other hand, other projects that are near the end or with much less activity might require more notification events so the user is sure they will be notified when a change occurs they should be aware of.

To change your email notifications:

1. Click on **My Preferences** from the Main Menu.
2. Click on **Email Notifications Events**.
3. Select each project from the drop-down and review the events currently set. Each event will show a highlighted "yes" or "no" under two columns labeled **Notify Me** and **Notify Others**. Click **Edit** to see who is getting notified for each event. You many add or remove your own name as well as others.

The All Notifications Report (#1090) displays who is getting notified for all events by project.

If you wanted to send a one-time notification about an issue to someone, click the "Notify Now for this Issue" tab on the View Issue page.

How to setup email notifications for a project

1. Click on **All Maintenance >> Set Email Notifications**
2. Select a project from the **Notifications for Project** drop-down list. Notifications for that event will be displayed.
3. Click the **Edit** link next to the event that you want to change notification settings.
4. On the **Edit Notification Event Recipients** page, you may:
    a. Add or remove AdminiTrack users (or other email addresses) who should receive email notification when this event occurs. You may select one or more users in either list box using Shift-click or Ctrl-click methods and then click the **Add >>** or **Remove <<** button to move the selected users to the other box.
    b. Have email notifications sent to non-AdminiTrack users by adding their email addresses to the lower text box. Multiple addresses must be separated by commas. Be careful that you enter their address correctly. AdminiTrack will attempt to verify the basic format of each email address. You must click the Save and Close button on this form to save your changes. To remove an external email address, simply remove it from the text box and click Save and Close.
5. Save your changes by clicking the **Save and Close** button.
6. You will now see "Yes" under the **Notify Me** column if your own name was chosen. You will see "Yes" displayed under the **Notify Others** column if users other than yourself were chosen.

How to change FROM email address in email notifications

You may change the email address/domain that notification emails use as the FROM header of notification emails. The default setting is notify@adminitrack.com and the FROM header will contain notify@adminitrack.com. Note, however, that the Reply-To header will contain the email address of the user who initiated the notification event. Therefore, clicking REPLY on most email clients will properly address the reply email back to the user who generated the event.

The reason for this default setting is that many email systems will reject email that contains says it is from a specific domain but does NOT originate from domain's IP address. This is due to additional security aimed to prevent spoofed emails (emails that appear to be from a specific address but were not sent by the owner of that address).

If you choose to change this setting from the default and no longer receive notification emails, you will need to check with your corporate email administrator or your ISP and request to have AdminiTrack.com's IP added to your "trusted list" or "white list" so that these emails will may be delivered. The AdminiTrack technical staff will be glad to assist in answering questions should this become an issue.

You may change the FROM header to no longer use the notify@adminitrack.com address and instead use the address of the person who generated the event. For example, if Tom@YourCompany.com receives a notification that an issue was just assigned to him by Bill@YourCompany.com. The FROM header will contain Bill@YourCompany.com since Bill was the initiator of the event.

To make this change:

1. Go to **All Maintenance >> Edit Account Options**.
2. Click the **Edit** link next to FROM Header Settings.
3. Mark the checkbox as appropriate for your account.

This option, Use Generic Address, when checked, will use a generic email address in the header such as notify@adminitrack.com to alleviate this problem. In addition, the sender's email name and email address is placed in the Reply-To header instead. Most modern email clients will use this header to address the email when the REPLY button is clicked so that the recipient may still reply back to the user who triggered the notification. The default setting for new accounts is to use this option (checked).

4. Click the **Save** button.

View All Notifications Report

From the **Email Notification Event List** page, you can generate a report showing all notifications for all projects that you are linked to. Click the **View All Notifications Report** link. (This is the same as Report #1090 in the Standard Reports List.) The report will list all notification events by project showing who created the notification as well as the recipient's name (or email address if a non-AdminiTrack user). Click the **Close** button to return to the Email Notification Event List.

Default Notifications

When a user is added to a project for the first time, they will have notifications created automatically. The event triggers that are created are dependant on your account's default notification settings. You can view and change the default notifications for your account (assuming you have appropriate permissions in your role) by clicking **All Maintenance >> Set Default Notifications**.

If the user was previously linked to a project, their notification settings for that project are not deleted and will reappear if the user is re-linked to the project at a later time. This allows a user to maintain their notification settings when they are accidentally or temporarily removed from a project and then re-linked to the project.

No Duplicate Notifications

Recipients should never receive duplicate email notifications for the same or overlapping events. AdminiTrack will automatically remove duplicates, while keeping the most specific one. For example, a user is setup to receive a notification when any issue is closed AND when any issue is modified. Either of these events would notify the user when an issue was closed (since modification implies any change to an issue). In this case, the user would only receive a single email indicating the issue was closed.

To suppress notification to yourself when the event was a result of your own action, go to the User Preference page (click **My Preferences >> Application Settings**) and check the checkbox labeled **Suppress notifications to me if I made the change**.

How to copy email notifications to another project

On the Email Notification Event List page (click **All Maintenance >> Set Email Notifications**), there is a button **Apply to Other Projects**.

To streamline the setup of notifications among projects, you have the option to copy notifications from one project (source) to another project (target). By using one project's email notification settings as a template for another project, you can set up your notification preferences in one project and then apply them to other projects easily. Only notifications that you defined will be copied to the target projects. Notification events with recipients that do not participate in the target project will not be applied for those recipients. You may then customize the notifications for individual projects if needed.

1. Mark the checkbox next to the appropriate projects. You may use the Select All link to mark all projects, or Clear All link to reset the form.
2. Click the **Apply Notifications** button at the bottom of the page.

Attachment Topics

Working with Attachments

AdminiTrack allows you to attach files to an issue or a project. This feature is very useful for attaching screen captures, emails related to the issue, project standards documents and more.

You attach a file to an issue from the Attachments tab on the View Issue page. If you are creating a new issue, click on the **Save & Attachments** button to save the issue and then upload a file and attach it to the issue.

You can also attach files to a project using the **Doc. Library** link on the Main Menu. The Document Library is useful for storing design documents, development guidelines, project plans, etc. If you want to access a document that is already stored in the Document Library, you have options to either view the document or save it to your local hard drive. This functionality works the same way for a file attached to a particular issue.

Manage Attachments

To manage your attachments, click on **All Maintenance >> Manage Attachments**.

- The top section **Current Attachment Statistics** provides a quick look at your attachment space utilization.
- The middle section **View Attachment Reports** provides links to reports that provide detail on attachments to issues as well as files in the Document Library. Click on a report title to view the report.
- In the last section, you may specify the **retention period** for issue attachments. Attachments on closed issues will be permanently removed one month after your specified retention time. This can assist in keeping your attachment space usage from continuing to grow. The default time period is 36 months (3 years).

Important: Deleted issue attachments are physically deleted from the database and cannot be recovered. If it is imperative that you retain a copy of your attachments, but you want to decrease your space utilization, contact support@adminitrack.com and request that your attachments be extracted first. The attachments can then be made available for you to FTP on a temporary basis.

The Document Library

The Document Library (**Doc. Library** link on the Main Menu) offers a repository to store project-specific documents for quick viewing or retrieval by everyone on your team. Documents such as project plans, specifications, sample HTML pages, and coding standards are typically stored here.

Features

- Documents are attached to individual projects, so only users in those projects can access them.
- Enter a short description about each document.
- Filter the list of documents by individual projects or all projects
- Bi-directional sorting of document list columns
- Separate icons for viewing or downloading (save to local drive) documents

To Add a Document to the Library

1. On the Attachment for Project page, select the appropriate project from the **Show for Project** drop-down list.
2. Click the **Add Attachments** button.
3. On the Upload Attachments page:
    a. Enter the **Description** (optional).
    b. Select the appropriate **Project**.
    c. Click the **Add Files** button and locate the file(s) you wish to store using the dialog window. To delete an uploaded attachment, click the [remove] link next to the filename.
4. Click the **Attach** button to upload the file(s) to the library. You should see your file(s) appear in the Library listing.

Important: You will see a progress bar that indicates the progress of your upload. You must not leave the progress bar before you see the file appear in the attachments list; otherwise, the upload will fail. Large files can take several minutes to upload depending on your local bandwidth and the size of the file. Please be patient during the upload of larger files.

To View a Document in the Library

1. Click the document view icon in the **View** column next to the document you wish to view.
2. A new window will open and the document will be displayed.

To Save a Local Copy of a Document in the Library

1. Click on the diskette icon in the **Save** column next to the document you wish to save.
2. A Save As dialog window will appear and permit you save the document in any local location you desire.

To Delete a Document from the Library

1. Click on the trash can icon in the **Delete** column next to the document you wish to delete.
2. The document will be deleted from the Library listing.

The trash can icon may not be available for documents that you did not store or do not have authority to delete.

To Filter the Library List by Project

1. Choose a project from the **Show for Project** drop-down list.
2. The list should refresh and only show those documents for the selected project.

Select *All Projects* from the For Project drop-down list to see all documents for all projects you have access to.

To Sort a Column in the Library List

1. Click on a column header to sort that column in ascending order. A triangle pointing up indicates ascending sort order (from smaller to larger).
2. Click the same column a second time to re-sort the column in descending order. The triangle will now point down indicating a descending sort order (from larger to smaller).

The Delete, View, and Save columns cannot be sorted.

Upload Attachments

The **Attachments** tab on the View Issue page allows you to attach files to an issue, view existing files already attached and save the attachment to your local hard drive. You can also access this page by clicking the Attachments button on the Add/Edit Issue page.

To Attach a File to an Issue

1. On the Attachment for Issue section of the Attachments tab, click the **Add Attachments** button.
2. On the Upload Attachments page:
    a. Enter the **Description** (optional).
    b. Click the **Add Files** button and locate the file(s) you wish to store using the dialog window. To delete an uploaded attachment, click the **[remove]** link next to the filename.
3. Click the **Attach** button to upload the file(s) to the library. You should see your file(s) appear in the Library listing.

Important: Do not close your browser or move away from this page until the upload is complete. Once the upload begins, a Cancel link will appear that may be used to cancel the upload. Time to upload may vary depending on your bandwidth and the size of the file(s).

To View a File Attached to an Issue

1. Click the document view icon in the **View** column next to the file you wish to view.
2. A new window will open and the file or document will be displayed.

To Save a Local Copy of a File in the Attachments List

1. Click on the diskette icon in the **Save** column next to the file or document you wish to save.
2. A Save As dialog window will appear and permit you save the file in any local location you desire.

To Delete a File from the Attachment List

1. Click on the trash can icon in the **Delete** column next to the file or document you wish to delete.
2. The file will be deleted from the Attachments listing.

Note: The icon may not be available for files that you did not store or do not have authority to delete.

Search Topics

Advanced Search

The Advanced Search feature provides many fields to search on. Any fields with values will be searched, and multiple fields are joined together in the search logic. You may specify an operand for each of the fields to have more control over the search.

Save a new search form

1. Enter your search criteria in the appropriate fields on the Advanced Search page.
2. Click the **Save this Form** link on the Advanced Search page. The criteria for your current Advanced Search can be saved and later retrieved to repopulate the form.
3. Enter a name for saved form.
4. Click the **Add** button.

Run a previously saved search form

1. Click on the **Retrieve Saved Form** link.
2. Click on the drop-down list box ("**Name**") and select a user-defined search.
3. Click the **Retrieve** button.
4. Your search criteria will be populated in the appropriate fields.
5. Click the **Show Results in Report** button to run the query.

Rename, Delete, Activate or Deactivate (hide) your Saved Searches

See "Maintain Saved Searches" on page 84

See "Search Results in Report Format" on page 85

Basic Search

Basic Search provides a quick way to locate issues without referencing the issue number. Basic Search will search across most text fields, excluding date, decimal and lookup fields. You may search across all projects that you are linked to (if more than one) or limit the search to a single project.

To run a basic search:

1. Click the **Search** link on the Main Menu.
2. Click the **Basic Search** link in the Switch To section near the top of the page.
3. You may enter text in the **Search for** textbox to perform a sub-string search across most issue fields. Mark the "Also search in Comments" checkbox, if necessary.
4. Select the name of the **Project** from the drop-down list box to limit the search to a single project.
5. You may limit the search to an Issue Type by selecting a **Type** from the drop-down list box.
6. **Issue Status** may also be selected to further limit your search.
7. Click the **Search** button.

Search Results

The search results appear in a report format. You may sort any column of the result set by clicking on the column header. Clicking a second time on the same column header will reverse the direction of the sort. You may print the search results to your local printer by clicking the **Print** link. Click the **Export** link to export the results to an Excel file. Click the **Choose Columns** link to select which columns display in the results report.

Comments Search

Comments Search provides the ability to locate issues by searching comments. This search option will perform a sub-string search.

To run a comments search:

1. Click the **Search** link on the Main Menu.
2. Click the **Comments Search** link in the Switch To section near the top of the page.
3. You may enter text in the **Search for** textbox to perform a sub-string search across most issue comments. Mark the "Also Search System Comments" checkbox, if necessary.
4. Select the name of the **Project** from the drop-down list box to limit the search to a single project.
5. You may limit the search to an Issue Type by selecting a **Type** from the drop-down list box.
6. **Issue Status** may also be selected to further limit your search.
7. Click the **Search** button.

Search Results

The search results appear in a report format. You may sort any column of the result set by clicking on the column header. Clicking a second time on the same column header will reverse the direction of the sort. You may print the search results to your local printer by clicking the **Print** link. Click the **Export** link to export the results to an Excel file.

Manage Custom Show Filters

Custom Show filters provide additional filter criteria to the built-in Show filters. To manage your existing filters, click on the Manage Custom Show Filters link on the Issues List.

- To create a new Custom Show filter, type a name for the filter in the Filter Name textbox and click the **Add New** button. Your new filter will appear in Show filter drop-down list. Next, click the Define Filter link in order to define up to three fields on which to filter.
- To rename a Custom Show filter, click the **Edit Name** link next to the filter name. You may also activate or deactivate a filter.
- To delete an existing Custom Show filter, click the **Delete** link next to the filter name.
- To edit an existing Custom Show filter, click the **Define Filter** link next to the filter name.

Note: Custom filters work with other filters, too, so make sure they are not in conflict. For example, if your custom filter is 'Assigned To = Joe', but you have the Assigned To filter set to "John", you will not see any issues listed.

Note: In order to filter on ONLY the Custom Show Filter, the other 3 drop-down lists (Project, Status, Assigned To) on the Issues List should be set to "Any" or "All".

Define Custom Show Filter

You may define up to three fields and corresponding values on which to filter the Issues List. The filter will be available in the Show Filter on the Issues List. Selecting a Custom Show filter will narrow the scope of issues in the list. These filters also work in conjunction with the built-in filters (Status, Project, Assigned To) on the Issues List.

To add a field:

1. Select a field from the **Choose field** drop-down list.
2. Click the **Add Field** to Filter button.
3. Select an **Operand**.
4. Enter a **Value**.

Floating date for date fields: You may type **today:0** to represent today's date. To represent a date >= 365 days before today's date, for example, you would enter **today:-365**.

5. You may add up to three fields.
6. Click the **Save and Close** button.

To edit an existing field:

1. Click the **Edit** link for the appropriate criteria.
2. Update the **Operand** and/or **Value**.
3. Click the **Save** link.

To delete an existing field:

1. Click the **Remove** link for the appropriate criteria.

Maintain Saved Searches

Use this list to rename, delete, activate or deactivate (hide) your Saved Searches from the Advanced Search Form. From the Advanced Search page, each search may be retrieved to repopulate the form. To access this page, click the **Maintain My Forms** link on the Advanced Search page.

- To edit the name of a saved search or mark it active/inactive, click the **Edit** link. After you are finished editing, click the Save link.
- To delete a saved search, click the **Delete** link. Please note that this action cannot be undone.

Search Results in Report Format

The search results appear in a report format. You may sort any column of the result by clicking on the column header. .

Column	Description
Print	To print the search results to your local printer
Export	Export Issues List to Excel
Choose Columns	To select which columns display in the results report. You may choose up to 20 columns to display at any one time. Select issue columns from the drop-down list to display in the search results.
Search Again	To start a new search

Reports Topics

Overview of Reports

When you click on the **Reports List** link in the Main Menu, you get a list of reports in the system. You may run any report by clicking on its title.

There are two types of reports in AdminiTrack:

- Standard Reports
- Custom Reports

Standard Reports

Standard Reports are the built-in reports that come with the application and appear in the first section of the Reports List. Most standard reports provide several query items allowing you to control what is included in the report. In addition, you can sort the columns once the report is generated. Click any column header to sort that column in ascending order. Click the same column a second time to have the sort reversed to descending order.

AdminiTrack provides several powerful reports that help you understand exactly where you stand. Most reports permit you to provide query criteria (see below) to include only the information you want on the report. Most reports are columnar in presentation, but others will display the data in tables and charts.

Custom Reports

Custom Reports are reports that you define. Any custom report you create may be kept private to your or shared with other users in the same project. You define not only the columns that appear in the report but the query definition behind the report as well. Custom reports appear in the second section of the Reports List.

One of the useful features of the reports list is the ability to use the drop-down list to filter the list of reports based on the category of the report. The exact list of categories and reports you may choose from are dependant on your role's permissions. Reports are numbered, so it's easier to remember your favorite reports and refer them to colleagues or locate them quickly.

Running Reports

Reports are listed by number, title and category. To run a report, simply click on its title. If any selection criterion is available for the report, you will be presented with those options. Criteria fields that are left blank are ignored by the report query. Clicking the Close button on a query form will take you back to the report listing. In many reports, you may select one or more projects to be included on the report. To select multiple projects, hold down the shift key while clicking on each project name.

NOTE: Your role must be linked to a report category in order to view reports within that category.

Report Results

Most report results are columnar in nature and will include the complete result. Click the **Print** link in the upper right side of the report to print the report. Many reports will also allow you sort each column by clicking on the column header. Clicking the **Close** link will take you back to the form. You may export report results by clicking the **Export** link.

Introduction to Custom Reports

The Custom Reports module is a powerful feature providing you with the ability to design, save and share your own issue reports. These reports are columnar reports and allow you to find and print information from your issue database. AdminiTrack will continue to provide Standard Reports (built-in) and Quick Stats that offer reports outside the scope of the Custom Reports module.

Overview of Custom Reports

In creating a custom report, the following issues need to be addressed:

- What will I name (title) my new report?
- Will I share the report with others or will it be private to me?
- Which columns should appear on my report?
- What criteria should I use to define which issues will be included in my report?
- Which columns would I like the report to be sorted on initially?

You may to choose up to 20 columns (fields) to appear on the report as well as the title, query criteria (defines what issues will appear in the report) and up to 2 fields to sort. The issue ID and Status State (O/C) are always included as the first two columns and are not part of the 20 that you may select. The third column, Brief Description, is also always included in the report and does count as one of the 20 columns. The report may be private (only you and Administrators may view it) or it can be available to others on your account. You can clone reports to make an exact copy of an existing report. This is useful if you want to create a new report that is similar to one that already exists.

Once the report is defined, you can run it and see the results. From there, you may print it, re-sort any column in ascending or descending order, or edit the report definition. You may also choose to export your report data to Excel.

The Custom Reports List

There are two different lists of reports in AdminiTrack. The first list is the Report Listing and is reached by clicking Reports List on the Main Menu. The second list is the Custom Reports. You may run a custom report by clicking on its title. This list may be filtered by category using the Category drop-down list. Selecting "All" will show all categories of reports including any custom reports that you can run.

To reach the Custom Reports List, click the button at the top of the Custom Reports section labeled Edit Custom Reports. If this button is not visible, then your current role does not have permissions to create or edit custom reports. However, you can still run any custom reports available in the main report listing by clicking on its title.

The Custom Reports List is where you can create new reports or maintain your existing ones. This list shows you all custom reports for your account that have been created and shared (not marked private) by others or created by you. You may run and clone reports from this list. You may also edit or delete custom reports using the Edit and Delete links, respectively, but only if you either created the report or have administrator authority. Clicking on the creator's name will open up a small window providing information about the author of the report.

Define or Edit a Custom Report

Click the **Define New Report** button to begin to create your custom report. Once a report is defined, its definition is saved. You can then run the report directly from either report listing. You only need to return here if you wish to change your report.

The steps to creating a new report are listed on the form:

- Enter a Title
- Define Columns and Criteria
- Choose Sorting
- Run Report

Step 1. Enter a Title

You may enter a title for your report that may be up to 70 characters in length. You can go back and change it later if you need to. Reports are identified by their title and system-assigned number.

Private Option:

- If this checkbox is present, you may uncheck it if you want others users in this project to view your report. If you do not check the private option, your report will be visible to other users on your account to run but not edit or delete. If you check this option, only you will be able view this report.
- If the checkbox is not available, it will indicate that the report is private to you and you will not be able to share the report with other users. Contact your system administrator and ask to have your role permission changed if you wish to make your reports publicly available to other users on your account.

Note: Users with Administrator authority can edit or delete any report, even if it is marked private.

Step 2. Choose Columns and Filter Criteria

In this section, two buttons are used to define the columns (fields) that will appear on the report and also the query criterion that determines what issues are included in your report.

Choosing Columns

1. Click the **Choose Column**s button to view or change what columns of data will appear on your report. This is an optional step since a default set of columns will appear even if this button is not clicked. The first column in all reports is Issue ID Number and may not be changed.
2. You may choose from 1 to 20 additional columns. On the Custom Report - Choose Columns page, select a column from the **Choose Column...** drop-down list at the top and then click the Add Column button.
3. To replace one column with another, click the **Edit** link next to the column in question,
4. To delete a column, click the **Remove** link.

Define Query Criteria

1. Click the **Define Query** button takes you to a page where you may determine what issues will be included in your report. You should always define some query criteria for your reports.

2. Define query criteria by first choosing a field from the **Choose a Field**drop-down list and then clicking the **Add Field to Query** button. This will add a new line (item) to your query with the field you chose listed in the Field Name column. Next, choose the operand for this field such as equal to, not equal to, contains, etc. The list of operand choices will appear in the Operand column and will vary in choice depending upon the type of field this represents. The operand for the last item in your query is not used and may be ignored.
3. Choose the value for this field. This value may be free text or you may pick your choice from a list. The method presented to you is based on the particular field you choose. Once the value is entered, click the Save button to save this query item.
4. You can add as many query items as you need. If you have only one query criteria item in your query, you may ignore the last option of choosing AND or OR. However, if you have multiple query items, the AND/OR setting determines how each query item is logically processed with the subsequent one. Multiple query items may be joined by a logical AND or OR value. Each field query item is defaulted to AND which is the most common setting you will use.

Example: Let's say you wanted to locate all issues that have Priority of "Now" and a Severity of "High". You would make sure the AND/OR setting was AND between these two query items. Only those issues whose Priority was "Now" AND Severity was "High" would be included. If you change the connecting AND/OR to OR, then all issues whose Priority was "Now" (regardless of severity) OR Severity was "High" (regardless of priority) would be included.

Specifying null (empty) values for Date and Text fields: For Date and Text fields, type null in the Value column. (If a particular field's value is null, that means there is no value stored. Null is not the same as blank or zero; it means that the field's value is empty.)

Using the Clone Button: Let's say you wanted to create a report that would show all issues assigned to Bill, Jane and Rick. You would create your first query item by choosing the Assigned To field and clicking the Add Field to Query button. Then pick "equal to" in the operand column and then choose Bill from the list of users in the value column. Now instead of choosing this Assigned To field and adding it again, you could use the Clone button to duplicate the query item you just created. By duplicating it twice, you can edit each of the new items choosing the appropriate user names from the list. In this example, you would want the AND/OR value between the three items to be OR and not AND. Why? We wanted to see all issues assigned to Bill OR Jane OR Rick. Using an AND value would not return any issues at all since no single issue could be assigned to more than one user at a time.

Delete query items from your query by clicking the **Delete** button and answering yes to the confirmation dialog.

Click the **Close** button when you are done creating your query criteria definition.

Step 3. Choose Sorting

You may optionally choose how your results will be sorted. You may choose a both primary and secondary sort field if desired and each field may be sorted in ascending or descending order. These values will be saved with your report definition so that your report will always be sorted by this setting. Regardless of what you choose here, you may resort any single report column in ascending or descending order by clicking on the white arrows in the report columns header.

Note that columns that represent fields with defined sort values (such as lookup values) will sort based on their sort value and not necessarily by their displayed name. For example, Priority would sort ascending as Now (10), ASAP (20), Important (30), No Rush (40) and Testing (50). The ability to define sort values for lookup field options allows you to control the sorting of these values when the alphabetical sorting of their display name does not make sense. Also note that changing the sort order by clicking in a column header will not change the order of your primary and secondary settings when a report is first run.

Step 4. Run the Report

Click the **Run Report** button. AdminiTrack will build and present your report as you have defined it. Once the report displays, you may choose several options:

- **Print** - Click the Print link to send the report to your local printer.
- **Edit** - Click the Edit link to access the main Add/Edit Report dialog (this option may not be available to you)
- **Close** - Click the Close link or your browser's Back button to return to your previous page.
- **Export** - Click the Export link to export and download the data from this report into Excel.
- **Choose Columns** - Select additional columns to display in the report
- **Sort Column** - Click on the white triangles in each column's header to sort the data in that column. Click the upward triangle to sort in ascending order or the downward triangle to sort in descending order.
- You will be able to click on the Brief Description to go directly to the View Issue page.

Custom Reports - Advanced Features

Cloning a Report

Just as you can clone a single query item, you may create a clone of an existing report from the Custom Report Listing. This can be helpful if you want to create a new report that is similar to an existing report. By cloning the existing report, you don't have to build your new report from scratch. It can also be helpful by allowing you to copy a report that you do not have permission to edit.

To clone a report

Click the **Clone** link next to the report you would like to clone. The complete report will be duplicated as a new report with you as the creator. The original title will now be prefixed with Copy of to indicate that this report was cloned. You may change the title to be whatever you like. You may also edit the new report.

Exporting a Report

After running a custom report, you may click the Export link to download the raw data of the report to Excel.

Quick Stats

The Quick Stats page gives you a quick overview of important issue statistics. This is a great way to get a quick bird's-eye-view of the system. By clicking on the System Stats tab you can view stats on all issues for all projects that are assigned to you. By clicking on the Personal Stats tab you can see statistics that only involve issues that either you created or are assigned to you. You can view the Quick Stats page by clicking on the Quick Stats link under the Reports section of the Main Menu.

System Stats

- Issue Status - counts by issue status (includes all open and closed issue statuses)
- Issue Status by Project - counts by issue status
- Open Issues by Age in Days - count of issues with Open status by time frame
- Unassigned Issues by Project - count of issues that are not assigned to anyone
- Open Issue by Priority - count of issues by priority
- Open Issue by Severity - count of issues by severity
- Disk Space Usage for Files

Personal Stats

Issues Assigned to You

- Issue Status by Project - counts by issue status (includes all open and closed issue statuses)
- Open Issues by Age in Days - count of issues with Open status by time frame
- Open Issues by Priority - count of issues by priority
- Open Issue by Severity - count of issues by severity
- Open Issue by Type - count of issues by type

Issues You Created

- Issue Status by Project - counts by issue status (includes all open and closed issue statuses)
- Open Issues by Age in Days - count of issues with Open status by time frame
- Open Issues by Priority - count of issues by priority
- Open Issue by Severity - count of issues by severity
- Open Issue by Type - count of issues by type

All Maintenance Topics

Manage Your Account Topics

Account Profile and Summary

The Account Profile page provides information that is specific to the company or person who subscribed to AdminiTrack's service. Only users with the Administrator permission in their role may access this section. The account record is divided into four main areas:

- Account Number, Creation Date, and Status
- Administrative Contact
- Billing Preferences
- Billing Contact

Summary tables are also displayed that include:

- Total number of users grouped by status (active, inactive)
- Total number of issues grouped by issue status (per account setup)
- Total space used by attachments (Issues vs. Document Library)

Edit Administrative Contact

The Administrative Contact is the account owner and primary contact. To edit the Administrative Contact's information:

1. Click **All Maintenance** on the Main Menu.
2. Click the **Account Profile** link on the Maintenance Center page.
3. Click the **Edit** link next to the Administrative Contact heading. Fields in bold are required.
4. After making your changes, click the **Save & Close** button to return to the Maintenance Center or click the Cancel button to exit the form without saving your changes.

Edit Billing Preferences

1. The Billing Method indicates how payment is made (invoice, credit card). To change your company's preferred payment method and associated information:
2. Click **All Maintenance** on the Main Menu.
3. Click the **Account Profile** link on the Maintenance Center page.
4. Click the **Edit** link next to the Billing Preferences heading. Fields in bold are required.
5. If you choose "**Invoiced**" as the Billing Method, you may enter a Purchase Order number, if necessary.
6. If you choose "**Credit Card**" as the Billing Method, please enter the following:
    a. Credit Card Type
    b. New Credit Card Number (leave blank unless adding or editing your card number)
    c. Expiration Month
    d. Expiration Year
    e. First Name on Card
    f. Last Name on Card
7. After making your changes, click the **Save & Close** button to return to the Maintenance Center or click the Cancel button to exit the form without saving your changes.

Note: For security reasons, please do not email your credit card information to us.

Edit Billing Contact

The Billing Contact is your company's primary contact for billing issues. To edit the Billing Contact's information:

1. Click **All Maintenance** on the Main Menu.
2. Click the **Account Profile** link on the Maintenance Center page.
3. Click the **Edit** link next to the Billing Contact heading. Fields in bold are required.
4. After making your changes, click the **Save & Close** button to return to the Maintenance Center or click the Cancel button to exit the form without saving your changes.

Estimated Invoice

You may view an estimated invoice for your AdminiTrack account based on the number of active users that have logged in at least one time.

To view the estimated invoice, click on the **Estimated Invoice** link on the All Maintenance page.

The estimated invoice is not an actual billing statement. Your actual charges may vary slightly from the estimated invoice based on changes in user status or other factors. However, it should be relatively close, especially towards the end of the month when our billing processes run.

Manage Your Application Topics

Edit Account Options

To edit account settings, click **All Maintenance >> Edit Account Options**. Following are the various options and descriptions:

Allow Editing of Closed Issues

To change the **Allow Editing of Closed Issues** setting, click the **Edit** link next to the current setting.

- **Yes** (Checked) - Closed issues can be modified by anyone with the appropriate permission. The issue does not need to be re-opened first. This is the default setting. The issue can be edited, deleted, assigned, closed and resolved by anyone with the appropriate permissions.
- **No** (Unchecked) - Closed issues may be modified or deleted only by Administrators. Any other user roles who would like to edit or re-open a closed issue would need to ask an Administrator to re-open the issue or change this account setting to "Yes". This option is often used by teams where tighter controls over Closed issues is required.

See "Editing Closed Issues" on page 32

System Administrator

The person who created your AdminiTrack account became the System Administrator by default. The System Administrator always has full permissions (authority) to access and manage all aspects of your account regardless of what role is assigned to them. This is the single most powerful user in the system. In addition, this user is automatically assigned as the corporate account technical contact person in the Help Desk page and may be contacted by other users for assistance. This user also serves as the contact person for communication and email notifications from AdminiTrack, Inc.

At least one user must always be assigned as the System Administrator, and this user record may not be deleted.

To re-assign the System Administrator to another user, click the **Edit** link under the current System Administrator's name.

See "Edit System Administrator" on page 108

Date Format

Current Date Field Format

You may choose from three different date formats for date fields in data entry forms. The three options include:

- mm/dd/yyyy (default)
- dd-mm-yyyy
- dd-mmm-yyyy

These formats only affect form fields that contain dates. All dates that are display-only (cannot be edited) are shown as **dd-mmm-yyyy** to avoid confusion for accounts with users in multiple countries with different date formats. It is important to understand that only one format may be selected for your account. All users must be aware of the correct format that you have chosen for your account. A sample format showing the correct way to enter the date is always displayed next to date fields. Dates entered using the pop-up calendar will automatically use your chosen format.

Contact your system administrator if you are unsure of the date format you should be using to enter dates. Dates entered in the wrong format will be rejected and a warning message provided.

To change your date format:

1. Click the **Edit** link next to the current Date Format setting.
2. Select the most appropriate Date Field Input Format.
3. Click the **Save** button.

Time Format

Current Time Zone

One time zone may be chosen for all dates and times displayed within your account. Each time zone is shown with the number of hours either ahead or behind GMT time. For example, Eastern Standard Time US is shown as GMT -05:00 (Eastern Time) US and Canada.

To change your time zone:

1. Click the **Edit** link next to the current Time Format setting.
2. Select the appropriate time zone from the Time Zone drop-down list.
3. Click the **Save** button.

> Note: Time zone settings only affect the way that dates and times are displayed. Therefore, you may change your setting at any time you decide a different zone is more appropriate for your account.

Default Email Settings

See "Edit Default Email Settings" on page 107

AAPI Gateway Options

The AdminiTrack Application Program Interface (AAPI) is an Internet-based gateway that can accept remote submission of issues and return data back to the calling program. AAPI provides AdminiTrack customers with the ability to securely submit issues to their AdminiTrack account using either HTML forms hosted on their own site or from their own applications external to the AdminiTrack system.

The AAPI gives AdminiTrack customers more options for working with their issues and provides additional functionality for using your AdminiTrack account in new and creative ways. Customers can write web-based or client/server applications that can securely add issues to their account from anywhere in the world. For example, your applications could provide a built-in interface for your customers to submit issues to your company. You retain full control of the data collection and user experience. This method requires the ability to initiate and manage Internet connections via HTTP. The gateway also supports secure submissions using HTTP(S) (Secure Socket Layer or SSL).

This section allows the account administrator to control how the AAPI gateway is used. You may skip this section if your account is not utilizing this functionality. If you would like to learn more about this capability, email support@adminitrack.com to request a copy of the AAPI User's Guide. This guide will assist you in learning how the AAPI works so you can decide if this would enhance your use of AdminiTrack.

You may set the AAPI options by clicking the **Edit Settings** link. On the AAPI Gateway Options page, change the values as desired and click the Save button to save your changes.

Option	Description
Enable the AAPI Gateway	Checked will enable the AAPI capability for your account.
Must use SSL (Secure Socket Layer)	Checked means that HTTPS must be used to submit an issue.
Submitting URL Mask	The first part of the URL for any submission must exactly match this string. For example, http://company.com. This limits the URL's that may submit issues to your account.
Submitting IP Mask	The IP of the submitter must match the mask. * may be used as wildcards such 24.67.159.*. This limits the IP addresses that may submit issues to your account.
Response URL	This is the URL to the response page used to provide feed-back to the remote user when an HTML form is used.
Response Email Address	Provide the FROM email address used in response emails back to submitter.
Response Email Name	Provide the FROM Name used in response emails back to submitter

Email Gateway Options

The AdminiTrack Email Gateway Application is an Internet-based gateway that can accept email submission of issues. The Email Gateway provides AdminiTrack customers with the ability to securely submit issue transactions to their AdminiTrack account by email. Please contact support@adminitrack.com to request access to this feature and provide your account number.

See "Email Gateway" on page 134

Edit Default Email Settings

Edit Default Email Notification Events

AdminiTrack can send automated emails to notify users, clients and other staff when certain events occur to an issue. Notification settings may be customized for each individual project. This permits you to tailor your email notifications based on the stage or activity your project is currently in. Notification recipients will receive an email notification anytime a specific event occurs for an issue within that project.

This section allows you define the default notification events that will trigger notifications for users when they are linked to any project for the first time. You can reach this page by going to **All Maintenance >> Edit Account Options** and click the **Edit** link next to Notification Events in the Default Email Settings section.

Some events are specific to the user, such as:

- any Issue is Assigned to Me
- any Issue I Created is Assigned

Other events are not specific to the user such as:

- any Issue is Assigned
- any Issue has any Status Change

Place a check next to each event that you want a new linked user to receive notifications. These events are just a starting point as each user may subsequently tailor their own notifications once they have access to the project. Once you selected the desired events, click the Save button to save your changes.

Notification Email FROM Header

See "How to change FROM email address in email notifications" on page 69

Edit System Administrator

You must be the System Administrator in order to reassign this privilege to another user.

1. Click **All Maintenance** on the Main Menu.
2. Click **Reassign System Administrator**.
3. On the Maintain System Administrator page, select the appropriate user's name from the Available Users list box.
4. Click the **Reassign Sys Admin** button to save your selection.

Manage Attachments

To manage your attachments, click on **All Maintenance >> Manage Attachments**.

- The top section **Current Attachment Statistics** provides a quick look at your attachment space utilization.
- The middle section **View Attachment Reports** provides links to reports that provide detail on attachments to issues as well as files in the Document Library. Click on a report title to view the report.
- In the last section, you may specify the **retention period** for issue attachments. Attachments on closed issues will be permanently removed one month after your specified retention time. This can assist in keeping your attachment space usage from continuing to grow. The default time period is 36 months (3 years).

Important: Deleted issue attachments are physically deleted from the database and cannot be recovered. If it is imperative that you retain a copy of your attachments, but you want to decrease your space utilization, contact support@adminitrack.com and request that your attachments be extracted first. The attachments can then be made available for you to FTP on a temporary basis.

Edit Projects

The following topics detail how to manage projects:

Edit Default Assignee for Projects

Each project may have its own default assignee setting. Note that this setting **only takes effect when new issues are created**. It is useful if you want to enforce all new issues to be assigned to a specific user for triage purposes or to suggest the most appropriate user, but still allow others to be assigned.

1. Click **All Maintenance** on the Main Menu.
2. Click on **Edit Default Assignee for Projects** under Manage Your Application. You are presented with a list of your existing projects. Only the projects you are currently linked to are listed.
3. Click the **Edit** link next to the project for which you wish to change the current default assignee settings.
4. Select a **Default Assignee** from the list of possible users presented.
5. Choose the **Method** by which the default assignee will be presented. Your choices include:
    - Assignee will be the default choice, but others may be selected from the list. This will always present the selected user as the assignee for the new issue but the creator may choose another user if desired.
    - Assignee will be the only choice for assignment of new issues. This option forces all new issues to be assigned to this user at the time the issue is created. This is useful in situations where you want new issues to be assigned to a specific user for triage or other purposes.
6. Click the **Save & Close** button.

Edit Roles and Permissions

Manual Sort for User Role Lookups

Manual sorting allows you to determine the order that a list of Role Name options will appear in a drop-down list. Otherwise, they will be sorted alphanumerically by name.

To re-order how the options will display in a drop-down list:

1. Click **Edit Roles/Perm** from Main Menu.
2. Select **Manual** from the Sort Method drop-down list.
3. Click the **Edit Sort** link below the Sort Method drop-down list to specify the order of the lookup values.
4. On the page Manual Sort for User Role Lookups, select a single item and click the appropriate button, Move Up or Move Down, to move it up or down, respectively.
5. Click the **Save & Close** button when list order is correct.

Edit Users

The following topics detail how to manage users:

Field Manager

The Field Manager is the central repository for standard and custom fields. To access the Field Manager, click on **All Maintenance >> Field Manager**. Depending on the permissions associated with your role, some features may or may not be enabled.

Standard fields are pre-defined by the AdminiTrack application; however, you have the option of (1) renaming certain fields and (2) defining which are present on the Issue and Resolution forms. You may define values for lookup fields and link those lookup values to various projects.

You may add up to 15 new custom fields.

Use the radio button options in the upper right corner to choose which type of field to display in the listing.

Column	Description
Field Name	The name of the field as it appears in the application.
Edit Type	Refers to the field's data type (drop-down list, multi-line text box, date, integer, decimal). It cannot be changed for standard fields.
Required	If Yes, a value is must be entered for this field in the application; otherwise, a value is not required. Please note that required fields are only enforced if they are present on the form.
Hidden	If Yes, the field will be hidden on forms, grids and drop-down lists.
Edit	Click the Edit Field link to manage attributes for a specific field.
Lookups	Click the Edit Choices link to specify choices for the drop-down list. Click the Replace link to replace all instances of one lookup value with another.
Lookups in Project	Click the Assign To Projects link to assign specific lookup values to a project.
Delete	This only applies to custom fields.

Note: After standard and custom fields have been defined using the Field Manager, they must be added to the Issue and/or Resolution forms. Please use the Form Manager to add a field to a form. Furthermore, required fields are only enforced if they are present on the form.

Edit Field

To edit attributes for a standard field, click on **All Maintenance >> Field Manager**. Then click the **Edit Field** link for the appropriate field. On the Edit Standard Field page, the following field attributes are displayed.

Standard Field Attributes

Attribute	Description
Field Name	The name of the field as it appears on the Add/Edit Issue and Resolution forms. You may rename some fields, but not all.
Original Name	The standard field name in AdminiTrack. (This is not editable.)
Edit Type	The data type of field: textbox (single line text), textbox (date), textbox (integer), multi-line textbox, or drop-down list. (This is not editable.)
Required	If checked, the field is required. Please note that required fields are only enforced if they are present on the form. Please use the Form Manager to add a field to a form.
Hidden	If checked, the field will be hidden on forms, grids and drop-down lists.
Help Text	This help text will display when the question mark icon next to the field is clicked.

Edit Choices for Lookup Values

When you first create an account with AdminiTrack, default values are defined for Issue Type, Severity, Priority, Environment, Repeatable, Browser, and Resolution Outcome. For many project teams, the default values will meet their needs and allow them to start using the system quickly.

Other project teams have particular standards or common terminology they prefer using. For instance, the default values for Severity are (Low, Medium, High). However, a particular team may prefer (1, 2, 3, 4, 5) or (Fatal, Impedes Work, No Impact) for Severity. In this case, the team can define their own values for Severity.

For custom fields, the following instructions also apply.

Add New Lookup Value

1. Click **All Maintenance >> Field Manager**
2. Click the **Edit Choices** link next to the lookup name that you wish to add a lookup value for.
3. Enter the new value.
4. Mark the "Auto Assign this Value to All Projects" checkbox if you would like this lookup value to appear in all projects.
5. Click the **Add New** button to add a new lookup value.
6. Click **Close**.

Edit Existing Lookup Value

1. Click **All Maintenance >> Field Manager**
2. Click the **Edit Choices** link next to the lookup name that you wish to edit.
3. Click the **Edit** link next to the lookup value you wish to edit.
4. Change the information you wish as necessary.
5. Click the **Save** link.
6. Click **Close**.

Delete an Existing Lookup Value

1. Click **All Maintenance >> Field Manager**
2. Click the **Edit Choices** link next to the lookup name for which you wish to delete values.
3. Click the **Delete** link next to the value to permanently remove that choice from the list.
4. Click **Close**.

Manual Sort for Drop-Down List Options

Manual sorting allows you to determine the order that a list of lookup options will appear in a drop-down list. Otherwise, they will be sorted alphanumerically by name. For example, you might prefer Priority options to be listed as Low, Medium, High.

To re-order how the options will display in a drop-down list:

1. Click **All Maintenance >> Field Manager**
2. Click the **Edit Choices** link next to the lookup name for which you wish to manually sort the lookup values.
3. From the "Choice for <field>" page, select "Manual" from the Sort Method drop-down list.
4. Click the **Edit** link next to Sort Method drop-down list to specify the order of the lookup values.
5. On the page Manual Sort for Drop-Down List Options, select a single item and click the appropriate button, Move Up or Move Down, to move it up or down, respectively.
6. Click the **Save & Close** button when list order is correct.

Assign Standard Lookup Values to Project

To assign standard field lookup values to a Project:

1. Click **All Maintenance >> Field Manager**.
2. Click the radio button for **Standard Fields**.
3. Click the **Assign to Projects** hyperlink next to the field to which you would like to assign to a project.
4. On the Assign Standard Lookups to Projects page, verify that the Choose a Lookup field is correct. You may select a different value from the drop-down list, if necessary.
5. Choose a project from the Assign to Project drop-down list.
6. Add lookup values that you want to link to this project by selecting the value in the Unassigned Lookup Values list box on the left and clicking the **Move >>** button to move the selected lookup values into the Values Assigned to Project list box. To remove lookup values, select the value in the Values Assigned to Project list box and click the **Move <<** button to move the selected values back to the Unassigned Lookup Values list box. You may select one or more values using standard Shift or Ctrl key combinations.
7. You may copy the lookup values for this particular project to one or more other projects by clicking the **Go Copy to other Projects** link in the bottom right corner of the page.
8. Click **Close** to exit the page. Or you may select another Lookup Field from the Choose a Lookup drop-down list to assign other values to projects.

Copy Lookup Values to Other Projects

You may copy the lookup values that appear in a source project to one or more target projects. Assign the lookup values you want to one project, then use this list to duplicate those lookups in other projects rather than having to edit each project individually.

1. Go to **All Maintenance >> Field Manager**
2. Click the **Assign to Projects** link for the field (standard or custom) in question.
3. From the Assign Standard/Custom Field Lookups to Projects page, assign lookup values to the appropriate project.
4. When you are ready to copy a project's lookup values for a particular field, click the **Go Copy to Other Projects** link at the bottom right corner of the page.
5. From the Copy Lookup Values to Other Projects page, you may copy the lookup values that appear in a source project to one or more target projects. Mark the checkbox next to each project that you would like to copy the lookup values to and then click the **Copy and Close** button.

Replace Lookup Values

This form will allow you replace all instances of one lookup value with another. The lookup value that was replaced may then be permanently deleted when no issues reference it. **Use with caution as this action can potentially change many issues and cannot be reversed.**

If you do not want a lookup value to be used in new issues, use the Edit Choices page to mark the value inactive. It will no longer appear as a choice for new issues, but will display in existing issues.

WARNING: Many issues may be updated by this action and cannot be reversed.

To replace all instances of one lookup value with another:

1. Click **All Maintenance >> Field Manager**.
2. Click the radio button for Standard Fields or Custom Fields as appropriate.
3. Click the **Replace** hyperlink next to the field for which you would like to replace lookup values.
4. Select the project from the "Update the following project" drop-down list.
5. Select the original value from the "Replace all instances of one lookup value with another" drop-down list. All issues that have this value will be replaced by the value you choose in the drop down below. This value will no longer exist in any issue.
6. Select the replacement value from the "with this value" drop-down list.
7. Click the **Replace** button.

Add a Custom Issue Field

1. Click **All Maintenance >> Field Manager**.
2. Click the **Custom Fields** radio button.
3. Click the **Add New Field** button.
4. Enter the label for the new Custom Field in the **Field Name** text box. This is how the custom field will appear on the Add/Edit Issue and Resolution forms.
5. Select the **Edit Type**:
   - **Text Box** is a single line edit control. You may control the amount of data entered by the user using the Max. Length attribute.
   - **Text Box (Date)** is for dates.
   - **Text Box (Integer)** is for integer data.
   - **Text Box (Decimal)** is for decimal data.
   - **Multi-Line Text Box** is a multi-line edit control, where the user can enter more than one line of text.
   - **Drop-Down List** type is a drop-down list box type of control often called a pick-list. The user is presented with list of options and may choose one. The options for this type of control are defined by clicking on the appropriate Edit Choices link (under the Lookups column) on the Field Manager.
6. If the field is required, mark the **Required** checkbox. Required custom fields are only enforced if they are present on the form. Please use the Form Manager to add a field to a form.
7. If the field needs to be hidden, mark the **Hidden** checkbox. The custom field will be hidden on all forms.
8. If the field is of type Text Box or Text Box (Integer), enter the maximum number of characters the user may enter into the **Max. Length** field. The acceptable range of values is 1 to 1000.
9. If the field is of type Drop-Down List, you may enter those values after you have clicked the Save & Close button on this page. Click on the **Edit Choices** link for this field from the Field Manager.
10. If you would like to provide help text for your users, enter it in the **Help Text** field. The help text will display when the question mark icon next to the field is clicked.
11. Click the **Save & Close** button when you are ready to save your Custom Field definition.

Edit Custom Issue Fields

Custom fields are fields you define for collecting additional issue attributes. You may define up to fifteen custom fields. Go to **All Maintenance >> Field Manager** and then click the **Custom Fields** radio button at the top of the page to view the list of custom fields defined for your account.

From the Field Manager, click the **Edit Field** link.

Custom Field Attributes

Attribute	Description
Field Name	The name of the field as it appears on the Issue and Resolution forms.
Edit Type	Fields may be of the following data types: • **Text Box** is a single line edit control. You may control the amount of data entered by the user using the Max. Length attribute. • **Text Box (Date)** is for dates. • **Text Box (Integer)** is for integer data. • **Text Box (Decimal)** is for decimal data. • **Multi-Line Text Box** is a multi-line edit control, where the user can enter more than one line of text. • **Drop-Down List** type is a drop-down list box type of control often called a pick-list. The user is presented with list of options and may choose one. The options for this type of control are defined by clicking on the appropriate Edit Choices link (under the Lookups column) on the Field Manager.
Required	If checked, the field is required. Please note that required fields are only enforced if they are present on the form. Please use the Form Manager to add a field to a form.
Hidden	If checked, the field will be hidden on forms.
Max. Length	Only applies to the Text Box and Text Box (Integer) data types and is used to limit the number of characters a user may enter for this field. The acceptable range of values is 1 to 1000. Use the smallest value possible so that values entered by users will not be too long for display.
Help Text	This help text will display when the question mark icon next to the field is clicked.

Delete a Custom Field

To delete a custom field:

1. Click **All Maintenance >> Field Manager**.
2. Click the **Custom Fields** radio button.
3. Click the **Delete** link next to the custom field you'd like to delete.

Manual Sort for Custom Field Lookups

Manual sorting allows you to determine the order that a list of lookup options will appear in a drop-down list. Otherwise, they will be sorted alphanumerically by name.

To re-order how the options will display in a drop-down list:

1. Click **All Maintenance >> Edit Custom Fields**
2. Click the **Edit Choices** link next to the lookup name for which you wish to manually sort the lookup values.
3. From the "Choices for Custom Field Drop-Down List" page, select "Manual" from the Sort Method drop-down list.
4. Click the **Edit** link next to Sort Method drop-down list to specify the order of the lookup values.
5. On the page Manual Sort for Drop-Down List Options, select a single item and click the appropriate button, Move Up or Move Down, to move it up or down, respectively.
6. Click the **Save & Close** button when list order is correct.

Assign Custom Lookup Values to Project

To assign custom field lookup values to a Project:

1. Click **All Maintenance >> Field Manager**.
2. Click the radio button for **Custom Fields**.
3. Click the **Assign to Projects** hyperlink next to the field to which you would like to assign to a project.
4. On the Assign Custom Field Lookups to Projects page, verify that the custom field is correct.
5. Choose a project from the Assign to Project drop-down list.
6. Add lookup values that you want to link to this project by selecting the value in the Unassigned Lookup Values list box on the left and clicking the **Move >>** button to move the selected lookup values into the Values Assigned to Project list box. To remove lookup values, select the value in the Values Assigned to Project list box and click the **Move <<** button to move the selected values back to the Unassigned Lookup Values list box. You may select one or more values using standard Shift or Ctrl key combinations.
7. You may copy the lookup values for this particular project to one or more other projects by clicking the **Go Copy to other Projects** link in the bottom right corner of the page.
8. Click **Close** to exit the page. Or you may select another Lookup Field from the Choose a Lookup drop-down list to assign other values to projects.

Form Manager - Add or Remove Fields

You may add or remove standard and custom fields from the Issue and Resolution forms. Click on **All Maintenance >> Form Manager**.

1. First, select a form you would like to work with from the Choose Form drop-down list. The Issue Form is selected by default.
2. Fields in the Available Fields (left) listbox column are available, but not currently displayed on the form. Fields in the Displayed on Form (right) column are displayed on the form. To add fields to a form, select one or more fields from the left listbox, then click the Add button. Similarly, to remove fields, select one or more fields from the right column and then click the Remove button.
3. To specify the order in which the above fields are displayed on their respective form, click the link View/Edit Order of Fields on Form to the left of the Choose Form drop-down list. You must select the appropriate form first.

Required fields are only enforced if they are present on the form. Some fields that are not shown here (Issue #, Project) always appear on the Issue and Resolution forms. In addition, Status and Brief Description always appear on the Issue form; and Created By and Brief Description always appear on the Resolution form.

Removing a field from a form only affects the form. The field will still be available elsewhere in the application.

Fields followed by the text **(hidden)** will not be displayed on a form until the Hidden checkbox has been unchecked. To uncheck the Hidden checkbox, go to the Field Manager, and click the Edit Field link for the appropriate field.

Display Order of Fields

You may change the display order of the fields on the Issue and Resolution forms. To access this page, go to **All Maintenance >> Form Manager** and click on the **View/Edit Order of Fields on Form** link.

1. Select a single field name and click the Move Up or Move Down button to move it up or down, respectively.
2. Click the **Save & Close** button when done.

Edit Report Categories

Report Categories allow both standard and custom reports to be categorized to suit the needs of your organization. Report categories allow you to:

- Limit the display of report choices to a single category
- Limit the view of reports in a category to specific user roles

Limiting report categories to specific user roles allows you to control which reports any user role may access. For example, you may want to limit administrative type reports to administrative roles only.

You may use the default report categories that were provided when you opened your AdminiTrack account or you may define new ones.

To add a new report category

1. Click on **All Maintenance >> Edit Report Categories**
2. To create a new category, enter the Category Name in the Value textbox and click the Add New button.

To edit an existing report category

1. Click on **All Maintenance >> Edit Report Categories**
2. Click the **Edit** link next to the category name you wish to edit.
3. Edit the details for the category as necessary.
4. Click the **Save** link to save your changes or click the Cancel link.

To delete an existing report category

1. Click on **All Maintenance >> Edit Report Categories**
2. Click the **Delete** link next to the appropriate Report Category to permanently remove that choice from the list.

To link report categories to a user role

See "Assign Report Categories to User Roles" on page 132

You may specify the sort order for the Report Category options as either Alphanumeric or Manual, by selecting the appropriate option from the Sort Method drop-down list. To customize the sort order for Report Category options: See "Manual Sort for Report Category Lookups"

Assign Reports to Report Categories

To assign a report to a report category:

1. Click **All Maintenance >> Assign Reports to Categories**
2. Click the **Edit** hyperlink next to the report to which you would like to assign a Report Category.
3. Select a Category Name from the drop-down list.
4. Click **Save** to save your selection.

Manual Sort for Report Category Lookups

Manual sorting allows you to determine the order that a list of Report Category options will appear in a drop-down list. Otherwise, they will be sorted alphanumerically by name.

To re-order how the options will display in a drop-down list:

1. Click **All Maintenance >> Edit Report Categories**
2. Select **Manual** from the Sort Method drop-down list.
3. Click the **Edit Sort** link below the Sort Method drop-down list to specify the order of the lookup values.
4. On the page Manual Sort for Report Category Lookups, select a single item and click the appropriate button, Move Up or Move Down, to move it up or down, respectively.
5. Click the **Save & Close** button when list order is correct.

Assign Report Categories to User Roles

To link report categories to a specific User Role:

1. Click **All Maintenance >> Edit Roles/Perm**
2. Click the **Assign** hyperlink next to the User Role to which you would like to assign Report Categories.
3. Add user roles that you want to link to this category by selecting the role in the Unassigned Report Categories list box on the left and clicking the **Move >>** button to move the selected report categories into the Linked Report Categories list box. To remove report categories, select the category in the Linked Report Categories list box and click the **Move <<** button to move the selected categories back to the Unassigned Report Categories list box. You may select one or more categories using standard Shift or Ctrl key combinations.
4. Click **Close** to exit the page.

Set Email Notifications

AdminiTrack can send automated emails to notify users, clients and other staff when certain events occur to an issue. Notification settings may be customized for each individual project. This allows you to tailor your email notifications based on the stage or activity your project is currently in. Recipients will receive an email notification anytime a specific event occurs for an issue within that project.

Some applications force you to choose who should be notified by email when you make a change to an issue. In contrast, AdminiTrack users are able to subscribe to notification events that they wish to be notified for. This is important, as some users may wish to reduce notifications on projects that they are actively working on daily and increase notifications for projects where the activity is decreasing. This is especially true for larger teams where management of notifications could become burdensome to an administrator.

Notification features include:

- Automatically notify you and notify others when a change (event) occurs to an issue.
- Choose from several different types of issue events for notification.
- People who are not AdminiTrack users can also receive notifications.
- Notifications can be different for each of your projects.
- Administrators can define which events a new user will notified for by default.
- You may suppress notification to yourself when the event was a result of your own action.

The Email Notification Event List page (click on All Maintenance >> Set Email Notifications) lets you choose who will be notified (recipients) and when (what events trigger the notification). The list of issue events are the same for each project. You decide who receives a notification when a particular event occurs. There are two basic categories of issue events:

1. Events that are specific to you: (Example: When any issue I created is closed)
2. Events that are generic and shared with others: (Example: When any issue is closed)

Since email notifications may be different for each of your projects, you first select a project from the drop-down list that you want to view or change email notification settings. All events are then listed below and will indicate Yes if you or others are set to receive a notification for that event. Click the Edit link next to an event to change who will receive notifications for that event.

In the first section, **Private Notification**, notice that each event name includes I or Me. These events are specific and private to you. Any setting you change here cannot be seen or altered by other users.

The second section, **Shared Notifications**, contains events that are general and shared with other users in this project. These users will see any changes you make and may change them as well. This allows other users to see what notifications have already been established by others.

Email Gateway

Purpose

The AdminiTrack Email Gateway Application is an Internet-based gateway that can accept email submission of issues. The Email Gateway provides AdminiTrack customers with the ability to securely submit issue transactions to their AdminiTrack account by email. This transaction allows an issue to be remotely created using any email client including cell phones. The gateway offers more options for working with your issues and provides additional functionality for using your AdminiTrack account in new and creative ways. With the Email Gateway, you can use AdminiTrack as an effective Help Desk or Issue Tracking System by allowing your customers, clients, business partners and others to submit issues or trouble tickets into your AdminiTrack account without the requirement of having an AdminiTrack User Profile. This can reduce your costs and enhance security by reducing the number of users you must add and maintain in your AdminiTrack account.

How It Works

The account's System Administrator establishes a Gateway Email address (such as issues.mycompany@adminitrack.com) which is recognized and accepted by AdminiTrack's email server. Emails sent to this address via standard Simple Mail Network Protocol (SMTP) will be retrieved at periodic intervals and processed. A processed email will either be converted into an issue in your AdminiTrack account or skipped completely (for example, if the Gateway Email address is not valid or is inactive). Your Gateway Email address must appear in either the TO or CC header; otherwise, the email will not be recognized by the email server. The Gateway Email address is unique to your account, allowing the gateway to identify which account the issue should be added to.

After the email is processed and an issue is successfully created, notification emails are sent to anyone who would normally be notified when a New Issue is created for the target project (either the Default Project identified in the account's email gateway settings or the project specified in the email.) Any users who wish to be notified about new issues created by this interface should review their notification events settings for the target project.

Note: Email attachments with the following extensions will be blocked by the AdminiTrack anti-intrusion system. Attachments of these types are considered executable and dangerous and are blocked or removed by most modern email systems. Attachments of this type must have the extension renamed or included in a ZIP, RAR or other compressed type of enclosure: 386, ADE, ADP, BAS, BAT, CHM, CMD, COM, CPL, CRT, DLL, DOT, EXE, HLP, HTA, HTML, HTM, INF, INS, ISP, JS, JSE, LNK, MDE, MSC, MSI, MSP, MST, OCX, PCD, PIF, POT, REG, RTF, SCR, SCT, SEA, SHB, SHS, SYS, URL, VB, VBE, VBS, WSC, WSF, WSH, XLT.

Getting Started

Subscribers must be able to perform the following functions in order to submit transactions via the Email Gateway:

1. Have a currently activated Trial or Subscriber account with AdminiTrack.
2. To setup the Email Gateway, go to **All Maintenance >> Edit Account Options >> Edit Settings** in Email Gateway section. Enter the following fields:
    - **Enable Email Submission** – If checked, the Email Gateway is active for this account; otherwise, it is inactive and emails will not be converted into issues.
    - **Gateway Email address** – Issues submitted by email should be sent to this address. The email address must be unique and should identify your company. Periods and dashes are allowed. It will become operational in approximately 3 to 5 minutes after you have saved your Email Gateway Options.

- **Forwarding Email address(es)** - You may optionally choose to forward emails from another email account to the Email Gateway. For example, someone might send email to support@mycompany.com or to info@mycompany.com which are forwarded to your Email Gateway address. The emails become new issues in your AdminiTrack account while the sender never realizes they were forwarded. Multiple addresses must be separated by a comma. Forwarded addresses must be accurately recorded because they will contain these addresses in the TO Header rather than your Gateway Email address.
- **Default Project** – Issues submitted via email will be created under this project if a project name is not found in the email.
- **Default Created By** – If the sender is not an AdminiTrack user, then the issue will be created by the user profile identified here.
- **Default Assigned To** – Incoming issues are assigned to this user. 'Unassigned' is also an option.
- **Process Attachments** - If checked, any attachments to a processed email will be added to the new issue.
- **Contact Name** - This person's name will appear as the contact person in confirmation emails when an error occurs. It is also used in the FROM header.
- **Contact's Email Address** - This email address will appear in confirmation emails when an error occurs. It is also used in the FROM header as well, so any replies to the confirmation email will go this address.
- **Issue Identifier** - An optional word or phrase that must be present in the subject or body of the email before it will be converted into an issue. If blank, then all inbound emails will be converted into an issue. Use of an issue identifier will allow you to control which emails are converted into issues. For example, the identifier should be unique so that most SPAM email would not be submitted as an issue. Examples include [issue] or make ticket.
- **Brief Description Prefix** - You have the option of specifying text that will be prefixed to the Brief Description. Example: *From Email:*

Table 1. Data mapping from email and Email Gateway settings to a new AdminiTrack issue

From Email and Email Gateway Settings	To New AdminiTrack Issue
Email Subject	Brief Description
Email Body	Full Description
Email Sender's name and email	System Comment
Email Sender's name, if an AdminiTrack user. Otherwise, Default Created By will be used.	Created By
Default Assigned To	Assigned To
Default Project	Project
Brief Description Prefix	Prefixed to Brief Description (ex. From Support Email:)
Allow Attachments (if checked)	Email Attachments added to the new Issue (max size is 50 MB)

Any emails sent to the Gateway Email address will be added to your selected project in your AdminiTrack account. It may take up to 6 minutes for the issue to appear once the email has been received by the AdminiTrack server, depending on email load and timing.

Export Data

You may export all or a portion of the issues in your AdminiTrack account into a Microsoft Excel file.

Since each row in Excel represents a single data record, issue data may be exported into two separate files:

- Issue Records - contains primary issue records keyed by Issue Number
- Comment and History Records - contains all Comments and History text (from the Comments and History area of the View Issue page) keyed by Issue Number.

The two files are necessary as each issue record may have one or more comment/history records. Therefore it is important to export both issue and comment records if you want all of the data exported. Each file will contain the Issue Number as the first data field, and this value may be used to relate the records between the two files.

To export your data:

1. Click **All Maintenance >> Export Data** (at the bottom of the page).
2. You will see the Export Data Wizard. Choose to export either Issue Records or Comments & History records and click the Continue button.
3. Choose the Issue Status (All Open Statuses, All Closed Statuses, or All Statuses) and the Project (select one project or All Projects) to include in the export.
4. If Issue Records were selected and you want to include large text fields in the export, mark the Include Large Text Fields in the export? checkbox. Large text fields are multi-line fields such as Full Description, Steps to Reproduce and Resolution Descriptions. These fields may contain significant amounts of text making the download lengthy or possibly result in formatting problems in spreadsheets or other programs.
5. Click the Export Data button to begin the export or the Previous button if you want to change any prior choices.
6. You will be presented with a dialog window to open or save the file.

