Administration Guide

Version 4.0

Updated August, 2016

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Overview

Notes for this Document

- **This document** is intended for RMTrack administrators. RMTrack also publishes a User Guide which is intended for general users. However, any RMTrack user may benefit from reading both, as certain features and functionality are explained in only one of the guides.

- **Help pages** are available within the application on every RMTrack page by clicking on the Help link located at the top left of each page. The Administration, User and Reporting guides are also available on-line from Help by selecting Help → Contents → Documents.

- **Issues** and **Projects** are two terms used throughout this document. Issue refers to the detail level of information. An issue can be thought of as one item or record within the application. Project refers to a group of issues linked by some common factor for example issues for a certain client or issues for a certain product. One of the features of RMTrack is the ability to change the naming for Issue and Project. For example the name for Issues might be changed to Defects, Bugs or Tasks and Projects might be changed to Clients or Products. The decision and ability to change these names is made by the site administrator. This document does not reflect any custom name changes made to a specific installation. Therefore, users may not see the word Issue or Project in their installation.

- **Issue Numbering** is another configurable feature of RMTrack. By default RMTrack numbers each issue uniquely across all projects i.e. Issue number 1 will only appear in one project. This is the issue numbering style presented in this document. Site administrators may choose to alter the issue numbering to ‘sequentially within each project’ i.e. each project will have an issue 1, for example P1-1 and P2-1 where P1 and P2 are project prefixes assigned by the administrator.

- **Please report** any errors or discrepancies you may find in this document to *support@rmtrack.com*. Your assistance is appreciated.

New with V4.0

Features and Usability

Complete lists of bug fixes, usability changes and new features are available from: **Help→Contents→ReadMe** under the New Features & Enhancements section.

Release notes for all versions and releases of RMTrack are also available from the download page of our website: *www.rmtrack.com/downloads*.

The following list contains some new feature and usability additions of special interest in V4.0 and where to find them in this document.

New Features Reference List

New Project settings: Active, Disabled, Read Only 35
Data Importer (Issues, Users, Code tables – import/update) 87
Add support for SSL/TLS to incoming/outgoing email 38/80
New data entry form designer 64
Support creating new fields directly from the data entry form designer............. 68
New custom HTML pages 78
Enhance password management and recovery... 98

RMTrack Hosted Service

RMTrack gives you the choice of installing the application locally on your servers or allowing us to host the application for you on our servers. For more information on the RMTrack Hosted service please contact *sales@rmtrack.com*.

System Requirements for Local Installation

Application (Web) Server

RMTrack is based on Microsoft Windows technology and requires one of the following MS Windows Servers to run the application:

- Windows Server 2016
- Windows Server 2012 R2
- Windows Server 2012
- Windows Server 2008 R2
- Windows Server 2008

RMTrack supports both 32-bit (Win2008) and 64-bit operating systems
Memory: 512MB RAM
Hard disk: 60MB (for installation)

Clients may also want to consider using disk mirror (RAID1) to ensure that a single hard disk failure does not result in data loss. Some form of a tape/optical backup method is highly recommended.

Database Server

RMTrack uses a Microsoft SQL Server database.

Supported versions include:

- SQL Server 2016
- SQL Server 2014 (SP1, SP2)
- SQL Server 2012 (SP1-3)
- SQL Server 2008 R2 (SP1-3)
- SQL Server 2008 (SP1-4)
- SQL Server 2005 (SP1-4)

Database size varies depending on use, setup and number of issues. Please contact *support@rmtrack.com* for assistance in calculating space requirements.

The database server does not need to be installed on the same server as the RMTrack application, but it must be connected via a network.

Browser Access

Different web browsers can be used to access the RMTrack Issue Tracking application. Current versions of Internet Explorer, Chrome, Firefox and Opera are supported.

The integrated screen capture tool is only available to IE users using the 32-bit version of IE with RMTrack ActiveX Controls installed. These are downloaded from the host server to the PC the first time a page requiring ActiveX is accessed.

E-Mail Server

RMTrack features an automatic e-mail notification service (outgoing e-mail) and the ability to monitor an e-mail address for issue creation (incoming e-mail).

Hosted installations have the choice of using the RMTrack mail server or their own, corporate e-mail server. Local installations must use your organization's e-mail server. The e-mail server must be addressable via domain name or IP address.

- Outgoing e-mail server must support SMTP standards.
- Incoming e-mail server must support POP3 or IMAP.
- RMTrack incoming and outgoing e-mail supports both SSL and TLS modes.

RMTrack Licensing

License Terms/EULA

RMTrack requires a license key to become active.

License keys are granted based on the **RMTrack End User License Agreement** (EULA) for local installations, or the **Terms of Service** and **Terms of Use** for hosted installations. Copies of the RMTrack EULA or Terms of Use and Service are available from Help on every page of the RMTrack application.

Hosted Installation: The first time a hosted site is accessed the user must accept the Terms of Service to activate the site. After the Terms of Service are accepted, the first time each user accesses the hosted site they must accept the Terms of Use to gain admission to the site.

Local Installation: The EULA must be accepted to complete the installation of RMTrack.

License Types

Floating-User licenses

Floating-user licenses are shared between users. When all floating-user licenses are in use, other users will not be able to logon. These are also known as concurrent licenses.

Named-User licenses

Named-user licenses work best for users who will be using the system regularly and require guaranteed access. These are also known as fixed licenses.

Mixed mode

RMTrack allows a combination of floating and named licenses.

Trial evaluation

The license key 1111-1111-1111-1111 will grant a 15 floating-user license for 14-days. Extended trial licenses are available by contacting RMTrack by telephone or e-mail *support@rmtrack.com*.

Note: Every installation of RMTrack requires separate and unique license keys.

Installation Notes

The basic installation of the RMTrack product is straightforward. Simply download the product and follow the on-screen instructions. An installation guide is available as a download from *www.rmtrack.com/downloads*.

Multiple Instances of RMTrack

It is possible to have multiple instances (databases) of RMTrack installed on a server. Each separate database must have unique license keys. In some installations it may be advantageous to have separate web sites pointing to the same database – these do not require separate licenses.

For more information on adding and maintaining multiple instances of RMTrack please refer to the section **Multiple Instances** in the **RMTrack Installation Guide,** available as a download from *www.rmtrack.com/downloads* or e-mail *support@rmtrack.com*.

Upgrading RMTrack

Periodically RMTrack releases new versions of the application. Versions are numbered with a 3-point numbering system. The first number is the major feature release number, the second number is the minor feature release number and the third is the maintenance release number.

The new version is installed by executing the installer program downloaded from RMTrack. The installer will allow you to connect to an existing RMTrack database. Any database upgrades are handled automatically. If a backup of RMTrack is recovered, the database will be automatically upgraded when first accessed.

> **NOTE: If multiple instances of RMTrack exist on the same server the installer will automatically invoke the *RMTrack Instance Manager* to upgrade any additional instances.**
>
> **WARNING: All RMTrack license keys must be eligible for the version upgrade. If an invalid key is found in a database the installation will complete but you will not be able to access the application. You will then need to remove the new version and re-install your old version. Your license key(s) can be found from the System→Licenses page.**
>
> **If you are unsure of the status of your license keys, contact *support@rmtrack.com* before attempting the upgrade.**

Getting Started with RMTrack

A Note from RMTrack Support

RMTrack offers full pre and post-sale support for our application. We are happy to answer any questions you have and offer any assistance required to introduce you to the application and to assist with configuring RMTrack to meet your specific needs.

RMTrack Support has years of experience in a variety of businesses and have assisted in the configuration of hundreds of RMTrack installations.

Please call or e-mail RMTrack Support to request assistance, guidance, on-line meetings … anything you need to get the most from RMTrack.

Overview

RMTrack was originally designed as an issue tracking application for use in software development. While RMTrack was always designed to be customizable to meet the needs of individual clients, over the years we have expanded the customization features allowing RMTrack to be used in many different ways and to track many different types of “items”. The best description of RMTrack now is:

“A web based application that allows a group of users to collaboratively manage items though a workflow process. Information about these items can be entered and updated throughout the process. Accountability is maintained by assigning each item to an individual user at each step of the workflow.”

Glossary of Terms

- Issue – the default term used for an “item” or single record in RMTrack. This default can easily be changed to reflect the items being tracked e.g. Bug, Lesson, Article, Request, etc.
- Project – the default term for a group of like issues. For reporting and for user access it is often desirable to group like items together. Again, this default term can easily be changed e.g. Customers, Regions, Categories, etc.
- User – an individual that has been granted access to the RMTrack application. Users are granted access using logon credentials (user Id and password). Access can also be granted using Windows Authentication. Each user can then be granted access to one or more Projects and is made a member of one or more Groups.
- Group – groups are used to group together similar types of users (or ‘roles’), for example Developers, Analysts, Managers. These groups are control the assignment rules for the workflow process. For example an issue that is sent for “Approval” must be assigned to a member of the “Managers” group. Groups can also control what items a user has access to and what information on each item they can access.

- User Security Type – each user is a member of a particular security type which controls what features the user has access to. RMTrack predefines Site Administrators, Regular Users and Public Users but more types can be added.
- Workflow – describes the process (or path) that an item follows while being tracked. Normally this process goes from creation to completion but some workflows are cyclical in nature, for example a maintenance schedule. Each project can have a different workflow i.e. a different process.
- Resolution – is a “step” in the workflow process. In RMTrack a resolution is represented as a box on the workflow diagram.
- Status – in RMTrack this is either OPEN or CLOSED i.e. Active or Inactive. The combination of status and resolution is referred to as the Resolution State. For example an item could be “Resolved – Open” or it could be “Resolved – Closed”.
- Transition – is the movement from one resolution state to another. In the RMTrack workflow diagram a transition is represented as an arrow. Transitions can be manual (i.e. a user moves the item) or automatic (i.e. the application moves the item based on elapsed time or the passing a certain date).
- Fields – are the individual pieces of information tracked about a particular item e.g. Summary, Description, Due Date, etc. You can create as many fields as you need to track you items. RMTrack allows for several different types of fields: Text, Date and Time, Dropdown list, Numeric, Checkbox (yes/no), Comment Log and Computed.
- Data Entry Form – is the collection fields associated with an item. Each project can have a different set of fields i.e. a different Data Entry Form.
- Code Tables – are a list of values used by a dropdown type field. The code table for a dropdown must be created before the field is created.
- Outgoing E-Mail (or E-Mail Notifications) - RMTrack has the ability to send an e-mail when any action in the workflow occurs. For example, when the Assignment of an item changes e-mail the user that is no assigned the item. RMTrack allows for multiple e-mail notification rules to be created and each project can have its own rules. Each e-mail rule can have its own e-mail template that is used to formulate the e-mail. These templates can include data from the item fields.
- Incoming E-Mail – RMTrack can monitor multiple e-mail addresses and automatically create items when e-mails are received.

First Access to a New RMTrack Installation

NOTE: To access your new RMTrack application logon with the user id: Administrator (no password).

When RMTrack is first installed (or a demonstration or hosted site first created) the database is essentially empty. However, some elements have been created out of necessity:

- A single user id: **Administrator** (no password).
- A single group: **Default Group**
- Three Security Types: Public User, Regular User and Site Administrator
- A single workflow: **Site Default**. This workflow contains the minimum required elements of an "Issue Create" step and "New" resolution state.
- A single Data Entry Form: **Site Default**. This form only contains the field "Project" which is required on all forms.
- No item "fields" exist except Project.

When you first access RMTrack you will see the following message:

Sample Configurations

If you have not had experience with RMTrack before, we suggest going to the sample configurations page. Here you will be able to load various sample RMTrack setups like: Defect Tracking and Support Desk. Selecting a sample and clicking the **Install Selected Sample** button will load Groups, Users, Projects, Workflow, Fields and Data Entry Form, plus a few sample items. You can then play with the application and make configuration changes. At any time, you can select another sample to try or you can go back to the **Empty** configuration.

Once you have finished exploring RMTrack and created your configuration, you may want to consider using the **Remove All Samples** button so that your configuration cannot ever be accidently overwritten by installing a sample.

Manual Configuration

If you are familiar with RMTrack, and do not want to start with a sample configuration, you can begin configuring your RMTrack installation using the administration functions available.

If you look above at the list of 6 elements configured in the “empty” setup, this is a good guide as to what you need to configure to get RMTrack working.

> **NOTE: We also recommend that in the early stage of your initial configuration you look at the “Site Options” section of this guide. This is where you can set things like Issue Numbering, Name for “issues” and name for “projects” among other site-wide options.**

You need users and those users need to belong to groups. Decide what the primary “roles” will be in your RMTrack setup and create a group for each. Then create some users to add to those groups.

Next, consider the process you want to track. When you create an item, what happens to it next? What group will be responsible for it? Once that step is complete, where does the item go next? Try sketching this workflow out and then go to the Workflow designer and create an RMTrack workflow.

Finally, what information do you want to track about each item? Go to the Data Entry Form designer and create your fields and your design data entry form.

> **NOTE: RMTrack is designed to allow for configuration changes at any time. Workflows can be changed and expanded, new user groups created and fields added. It is best to start with a simple configuration and add to it, as needed, over time.**

New Project Wizard

The New Project Wizard is used to guide you through the setup of individual projects. It is recommended that you have a basic configuration in place before creating projects. For more information, please refer to the **Projects** section of this guide.

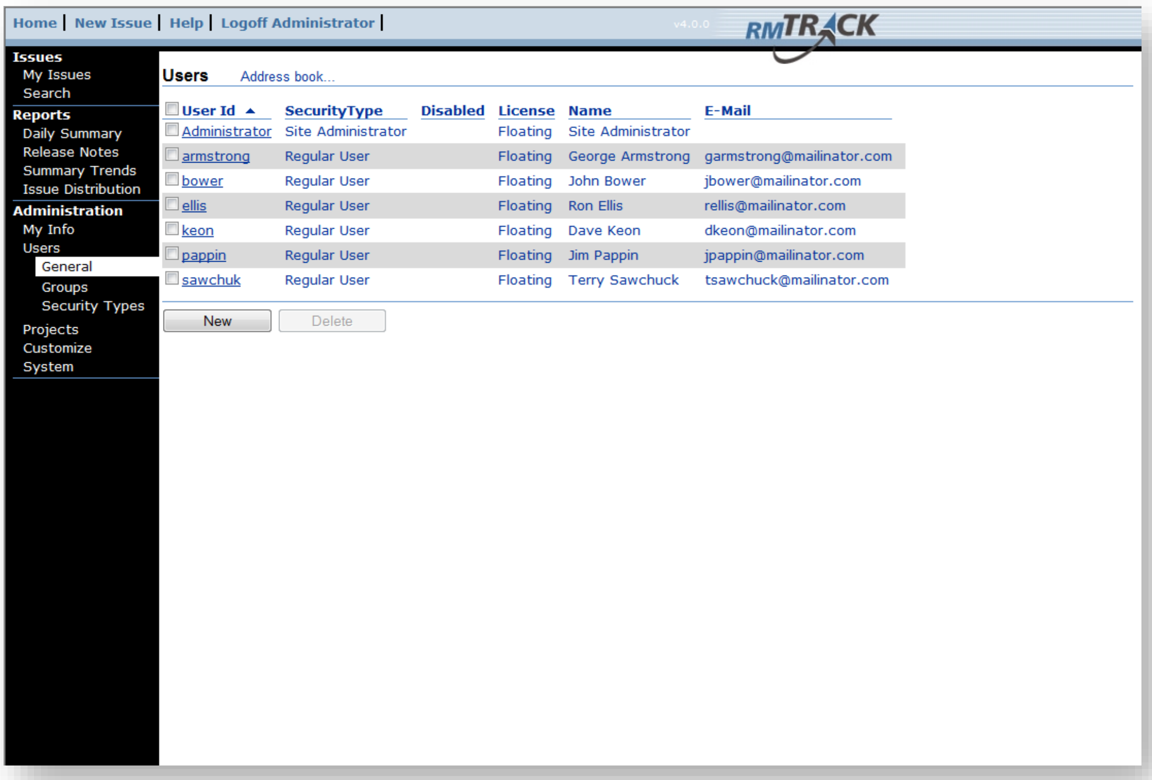
Users Menu

General

Users are individuals that have been granted access to the RMTrack application. Users are granted access using logon credentials (user Id and password). Access can also be granted using Windows Authentication.

Each user can then be granted access to one or more **Projects** and is made a member of one or more **Groups**

List of users

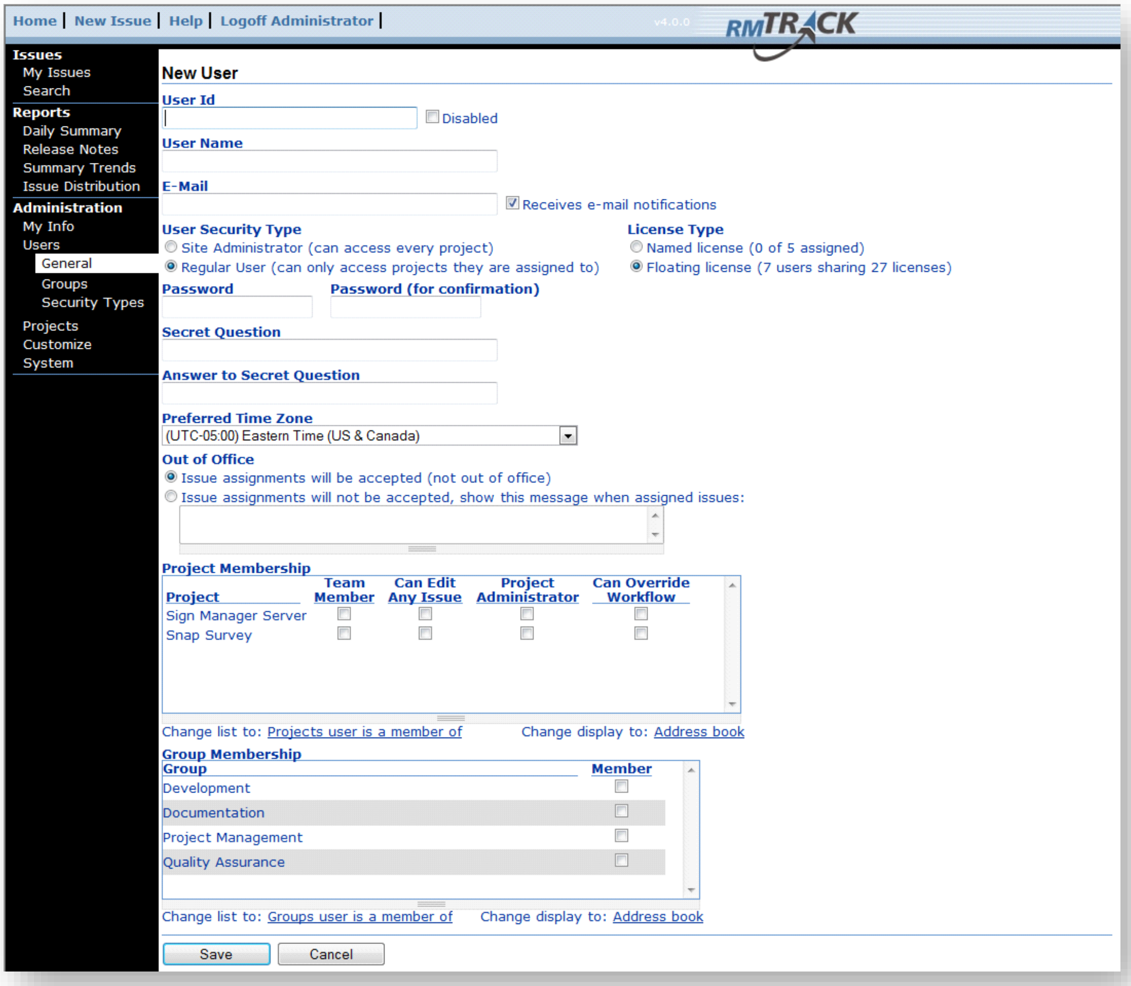


The list of users can be toggled between **Full list** and **Address book** styles by clicking the link beside **Users** at the top of the page. The Address book style will only show user ids beginning with the selected letter and is best for large installations with many users.

To add a new user, click the **New** button. To modify a user, click on the user id. To delete a user, mark the box to the left of the user id and click the **Delete** button.

> **NOTE: Users with open issues assigned to them cannot be deleted. Care should be taken when deleting a user as it is possible the user may have created issues that are still open. If your workflow uses the “Must be assigned to original creator” rule this may cause problems.**

User Details



User ids can be **Disabled** by checking the box beside the user id. Disabled users cannot log in to RMTrack, cannot have issues assigned to them and will not receive e-mail notifications or subscriptions. Disabled user records cannot be modified; you must uncheck the disabled box to make changes to the record.

Users can be flagged to receive automatic e-mail notifications. For more information, please refer to the section **E-Mail Notifications** in this guide.

Choose the security type for the user. If the user is to be a site administrator mark the Site Administrator option.

> **NOTE: At least one user must have site administrator privileges. Trying to delete, deactivate or change security settings for the last site administrator will be disallowed.**

For more information, please refer to the section **Security Types** in this guide.

If your installation uses mixed mode licensing i.e. floating-user and named-user, you must choose which type of license this user is assigned. If your installation only uses one type of licensing, the user will default to the available license type. If you have named-user licenses only, and all available licenses have been assigned, you must disable another user before you can create a new user. Displayed beside the license type choices, is the number of users currently using each license type. Any number of users may be assigned to floating licenses. Each named-user requires a separate license. For more information, please refer to the section **RMTrack Licensing** in this guide.

Preferred Time Zone

The user's time zone can be set here. Preferred time zone is used for the display of all date/time fields and will adjust these fields appropriately to the preferred time zone of the user.

Out of Office

This setting allows users to be temporarily removed from all projects. By selecting the "Issue assignments will not be accepted" option, no issues can be assigned to this user. If another user attempts to assign an issue to an out of office user an error will occur. The error message appears at the top of the issue page:

Please correct the following error

- User test is 'Out of Office' and cannot be assigned issues (user's message).

The Out of Office section will normally be completed by the user when they are out of the office but can also be updated by a Site Administrator.

Project Membership

For each project a user can be designated as:

- Team Member: Has access to issues in the project and can update issues that are assigned to them.
- Can Edit any Issue: Can update any issue in the project, even when it is not assigned to them.
- Project Administrator: Can update any issue in the project, add project related code table values, and add users to the project.
- Override workflow: Allows the user to by-pass all workflow rules for this project. Note: this setting is not recommended for regular users.

The project membership selection list can be toggled between **All projects** or just **Projects user is a member of**. The list can also be toggled between a **Full list** and **Address book** styles.

Group Membership

Non-Site Administrators must be a member of at least one group. Users can be members of multiple groups.

NOTE: A user's security level i.e. access to issues and issues fields will default to the group with the <u>most</u> privileges when the user is a member of multiple groups.

The group membership selection list can be toggled between **All groups** or just **Groups user is a member of**. The list can also be toggled between a **Full list** and **Address book** styles.

> **NOTE: Users that are members of the security type designated for public projects will automatically be members of all public access projects. Public users cannot have their project membership changed.**

Login as…

This button is available when editing an existing user record. It allows an administrator to log in as the selected user. This can be useful when helping with user related problems and during initial configuration.

Groups

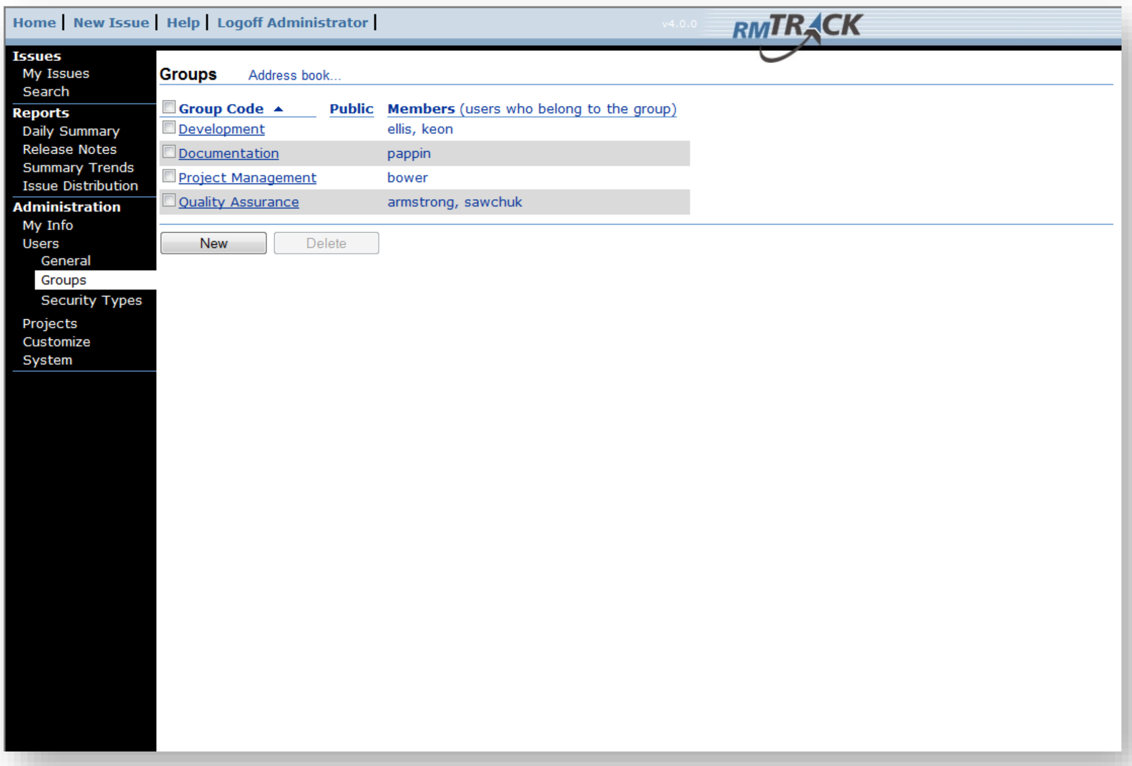
Groups represent the “roles” of a project team, for example: **Developers** or **Managers**. The workflow system uses these groups to control which users can be assigned issues at certain points (resolution states) in the workflow process.

Issue access can be restricted at the group level by setting a group to only be allowed to access issues that the user created or that were assigned to the user at one time.

Groups are also used to control **field level security**, which is the access level to individual issue fields.

You can create as many groups as you require.

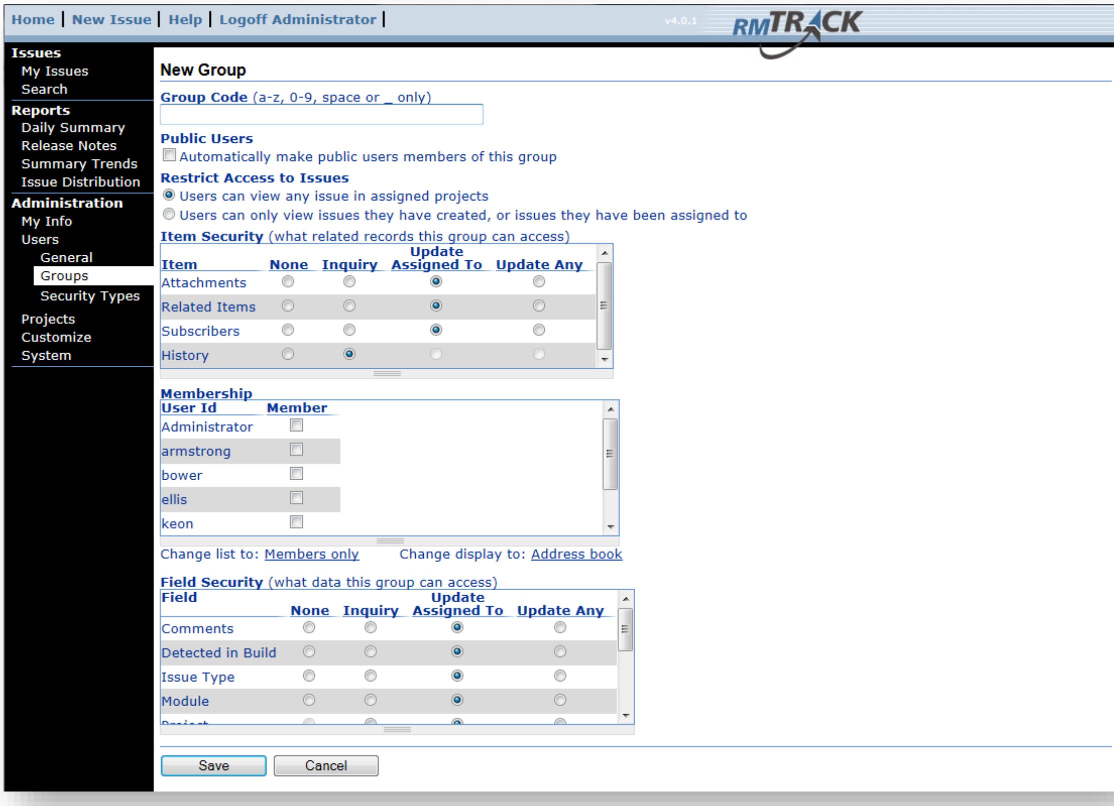
List of Groups



The list of groups can be toggled between **Full list** and **Address book** styles by clicking the link beside **Groups** at the top of the page. The Address book style will only show groups beginning with the selected letter and is best for large installations with many groups.

To add a group, click the **New** button. To delete a group, check the box to the left of the group name and click the **Delete** button. To modify a group, click on the Group Code.

Group Details



Each group must have a name or **Group Code**. Groups can be designated as **Public** groups. Designating a group as public means that any public user who creates their own user id will be automatically assigned to this group. Generally, you would only designate one group for public users. For more information, please refer to the section **Public Access Projects** in this guide.

Restricted Access to Issues

Groups can be designated as **Restricted Access** by checking the appropriate option. Members of restricted access groups only have access to issues that they created or were assigned to at one time. Users that are members of a restricted access group will not have access to the Daily Summary report or the Release Notes report.

> **NOTE: Users can be assigned to more than one group. For all Issue access, Item Security and Field Level Security (see next sections) functions, RMTrack will assume the HIGHEST access level provided by a user's group memberships i.e. if a user belongs to group A and to group B and group A has restricted access but group B is unrestricted, the user will have unrestricted access.**

Item Security

This section controls what issue related records a group can access and update on the issue details page. Issue related records appear on the right side of the issue details page and include: Attachments, Related Items, Subscriptions, and Issue History.

Attachments

Permission	Meaning
None	Attachments will not be shown.
Inquiry	Existing attachments will be listed and can be opened.
Update Assigned To	Attachments can be added and removed only when the issue is assigned to the user.
Update Any	Attachments can be added and removed from any issue the user has access to.

Related Items

Permission	Meaning
None	Related items will not be shown.
Inquiry	Existing related items will be listed and links are active.
Update Assigned To	Related items can be added and removed only when the issue is assigned to the user.
Update Any	Related items can be added and removed from any issue the user has access to.

Subscriptions

Permission	Meaning
None	Subscriptions will not be shown and users cannot subscribe to an issue.
Inquiry	Existing subscriptions are shown but the user cannot subscribe or unsubscribe.
Update Assigned To	The user can subscribe or unsubscribe themselves from any issue that is assigned to them. (Also see note below)
Update Any	The user can subscribe or unsubscribe themselves from any issue that they have access to. NOTE: If the site option enabling subscriptions allows users to subscribe or unsubscribe other users, they can also subscribe or unsubscribe other users from issues based on the Assigned To or Update Any rules.

Issue History

Permission	Meaning
None	Issue History is not shown
Inquiry	Issue history is shown

Membership

The group membership selection list can be toggled between **All Users** or just group **Members only**. The list can also be toggled between a **Full list** and **Address book** styles.

When using the All members list, members are added to (or removed from) the group by checking or unchecking the box beside the user id. When using the Members only list, add members by selecting the user from the dropdown.

Field Security

Field level security is maintained at the group level. This allows the site administrator to control what fields can be accessed by which groups and what the level of access is. New issue fields will default to **Update** access. Field access can be changed by clicking the appropriate radio button beside the field on the Group Details page.

> **NOTE: The ability to allow users to change the Project of an existing issue can be controlled here. By setting the Project field to 'Inquiry' certain groups can be restricted from changing what Project an Issue belongs to.**

The following table describes the four levels of access for a field:

Permission	Meaning
None	The field will not be visible to the user on the My Issues list or the Issue Details page. The layout designer, filter wizard and advanced filter page will not show the field in the list of available fields. An exception is the Project field. This field can be set to 'Inquiry' or 'Update' only – 'None' is not an available option. For site administrators this setting is ignored. A site administrator can always update any field.
Inquiry	The field will be visible to the user on the My Issues list and the Issue Details page, but the contents of the field cannot be updated. The layout designer, filter wizard and advanced filter page will show the field. The Issue Details page will show the field, but the field will be disabled. For site administrators this setting is ignored. A site administrator always can update any field.
Update Assigned To	The field will be visible and can be updated by the user if the issue is assigned to the user. If the issue is not assigned to the user the field is visible but cannot be updated. For site administrators this setting is ignored.
Update Any	The field will be visible and can be updated by any user that has access to the issue regardless of who the issue is assigned to.

IMPORTANT CONSIDERATIONS FOR FIELD LEVEL SECURITY:

- **If a user's group membership restricts them from viewing certain fields, they will not be able to access full history details as that would allow them to view restricted fields.**
- **If a user creates a filter that uses a field that they have access to and then at a later time access is denied, they will still have that filter. They will not be able to view the fields but may be able to intuit the value of the field based on the filter results.**
- **All users can create advanced filters. Advanced filters do not restrict access to fields. A user could create advanced filters that would allow them to intuit field values.**
- **If a user that has access to a field creates a filter that uses that field and publishes the filter to all users, all users will be able to use that filter and may be able to intuit the field values.**
- **Workflow rules that designate fields as required will be ignored if the user does not have update access to the required field(s).**
- **E-Mail notification templates that contain imbedded issue fields that some users do not have access to, will still be received by designated recipients and the restricted fields will appear in the e-mail.**

Security Types

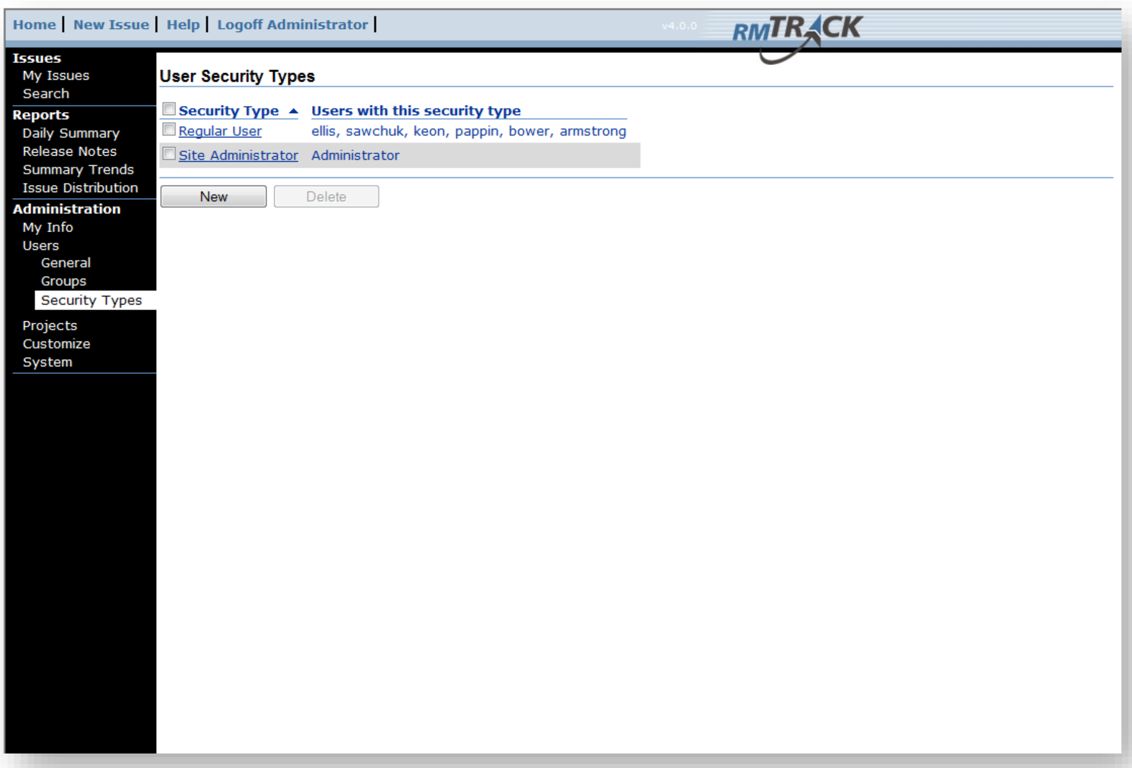
Each user in RMTrack must belong to a Security Type. This setting is used to control access to features in RMTrack. A "Site Administrator" security type must exist and cannot be modified. Site Administrators have access to all the administrative functions in RMTrack e.g. user maintenance, project maintenance, workflow maintenance etc.

Generally, each installation will also have a "Regular User" security type who does not have access to the administrative functions.

If you use Public Access projects, you will probably want to create a "Public User" type.

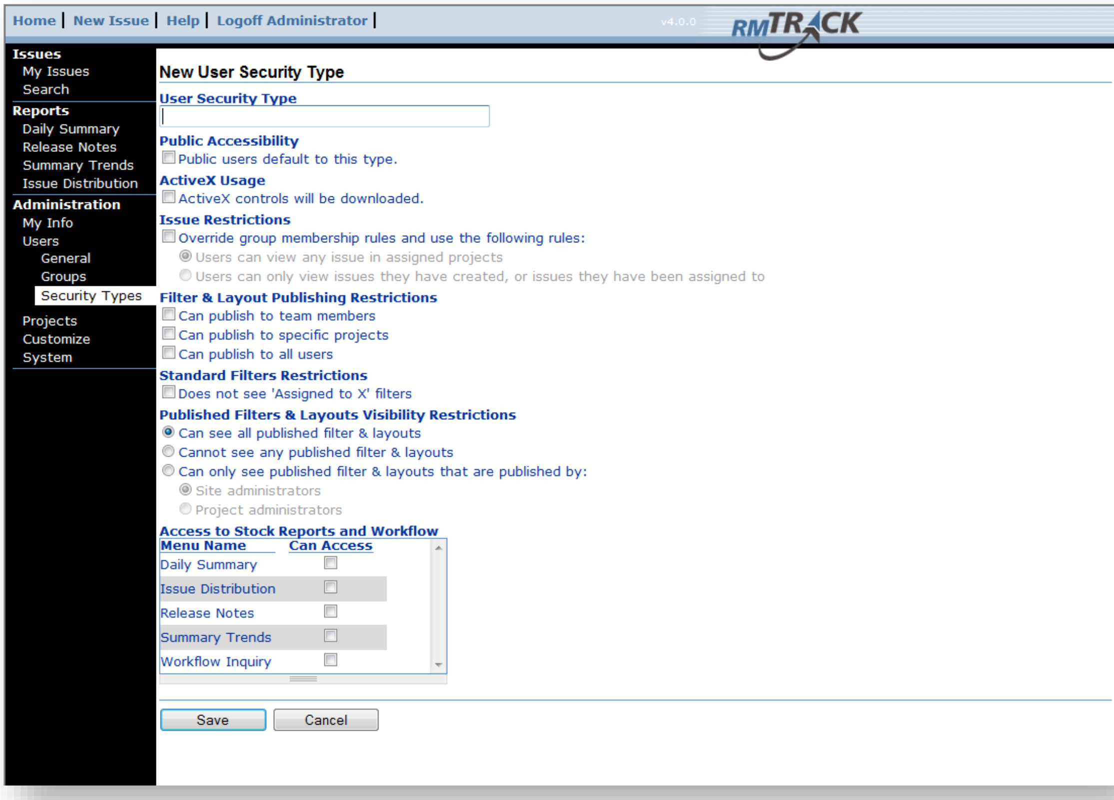
You can create as many security types as required.

List of Security Types



To add a Security Type, click the **New** button. To delete a Security Type, check the box to the left of the Security Type name and click the **Delete** button. To modify a Security Type, click on the Security Type name.

Security Type Details



Public Accessibility

A Security Type can be the designated as the default for Public users by checking the appropriate box. Only one Security Type can be the default for Public Users and all Public Users will be automatically assigned to this Security Type. For more information, please see the section **Public Access Projects** in this guide.

ActiveX Usage

This controls whether or not this security type will be prompted to download the RMTrack ActiveX Controls for use in MS Internet Explorer. Security types that are not set to download ActiveX will not be able to use the RMTrack Screen Capture tool and may not be able view the workflow diagram (IE9 and higher will see the HTML5 workflow diagram).

Issue Restrictions

Group access rules can be overridden by checking the appropriate boxes. If selected, users of this Security type, regardless of group settings, will use the selected issue access type.

Filter & Layout Publishing Restrictions

Each Security Type can have filter and layout publishing rights set to limit whether they can publish filters and layouts and who they can publish to.

Standard Filters Restrictions

By default RMTrack will display a set of standard filters based on the “Assigned to” field on issues, for example **Assigned to Bob**. These filters can be hidden for a security type.

Published Filters & Layouts Visibility Restrictions

For each security type, you can control what published filters and layouts they can see by selecting the appropriate settings.

Access to Stock Reports and Workflow

Access to “stock” reports and the workflow can also be controlled for each security type.

> **NOTE: Custom report publishing is controlled on the custom report settings on report by report basis. For more Information on publishing custom reports please refer to the Custom Reporting Guide.**

Projects Menu

General

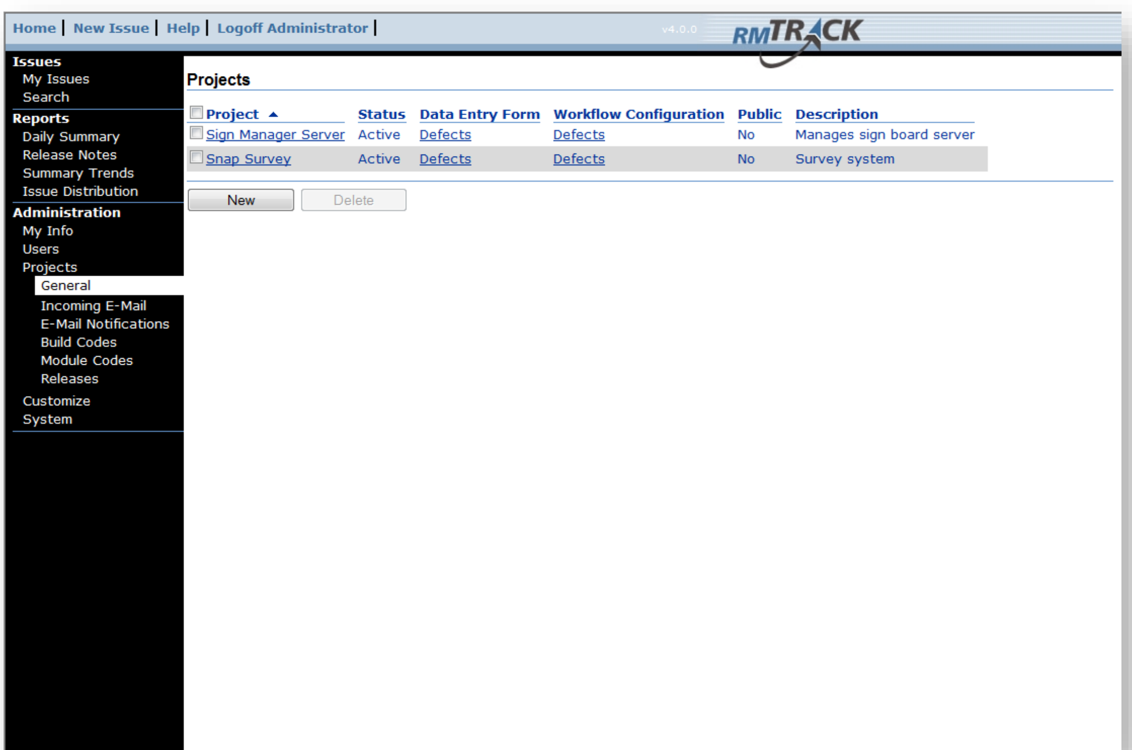
Project is the default term for a group of similar issues. It is often desirable to separate issues into projects because each project can have a different process (Workflow), a different set of fields (Data Entry Form), and a different group of users that are part of that project team. Separate projects also allow for more refined reporting on issues.

You can create as many separate projects in RMTrack as you require. Projects can be added, removed, or disabled at any time.

The name “Project” can be changed in your installation from **System > Site Options > Name for “Projects”.** For example, you may want to call your groupings: Clients, Products, Departments, etc.

List of Projects

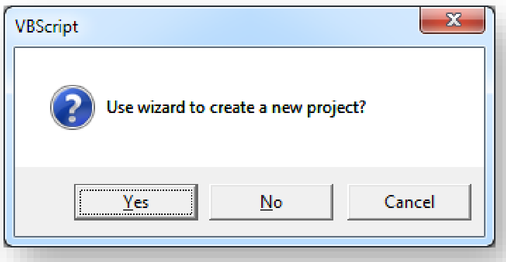
The Project list includes the name of the Project, a Status indicator, the Data Entry Form used by the project, the Workflow used by the project, whether the project allows Public Access and the long description. For users that have the necessary access rights, the Data Entry Form and the Workflow are links directly to those pages.



To add a new Project, click the **New** button. To delete a Project, check the box to the left of the Project name and click the **Delete** button. To modify a Project, click on the Project name.

> **WARNING: When a project is deleted all of its issues are also deleted. It is strongly recommended that a database backup be done prior to deleting a project.**

There are two ways to create a new Project. After clicking the **New** button, the following dialogue will be displayed:



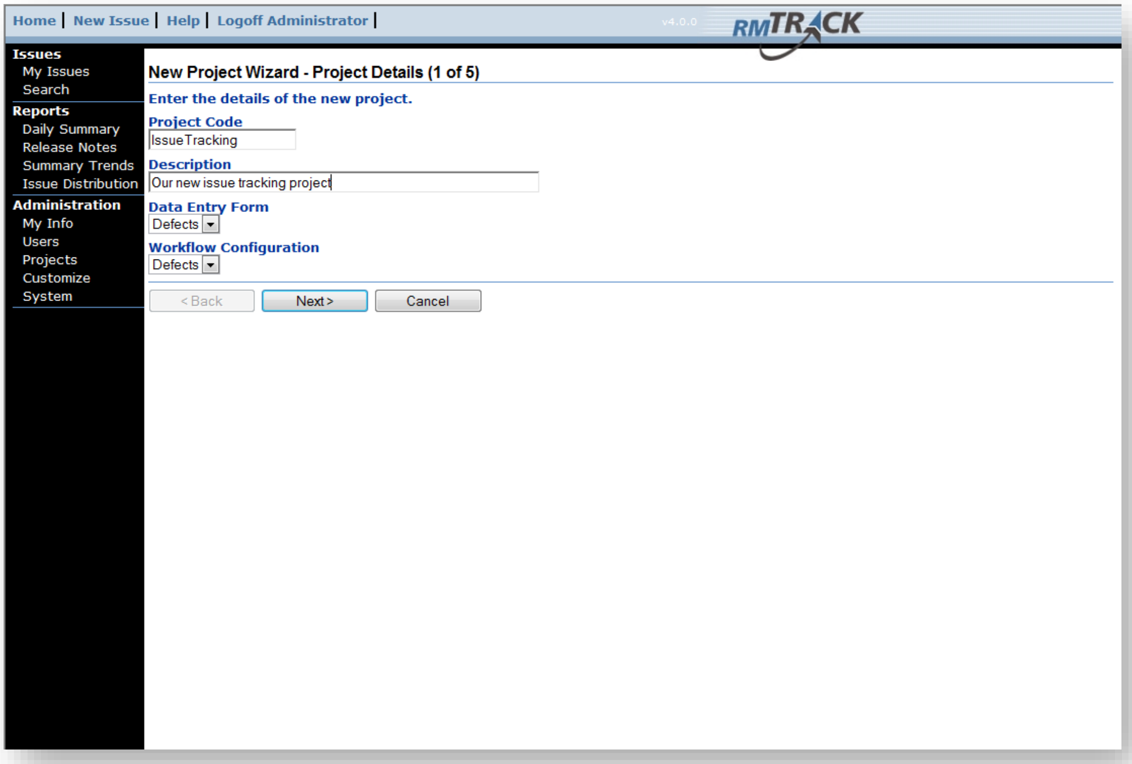
The Project Wizard will guide you through all necessary steps to create a new project and is recommended when you are unfamiliar with Project setup. The wizard is described in the next section.

You can also choose create a project directly from the Project Details page. The details page is described in the section following the wizard.

Project Wizard

There are five pages to the Project Wizard. You can navigate forward and backwards through these pages using the **<Back** and **Next>** buttons at the bottom of each page. You can **Cancel** the wizard at any time.

Project Wizard - Project Details



Project Code is the name of the project that will appear in all dropdowns and references to the project. The code can be up to 50 characters long however names that long may affect the display on some pages. It should be descriptive enough that users will recognize which project it is without being excessively long.

There is also a field for **Description** that can be used to provide a longer description of the project and can be used in custom reports if desired.

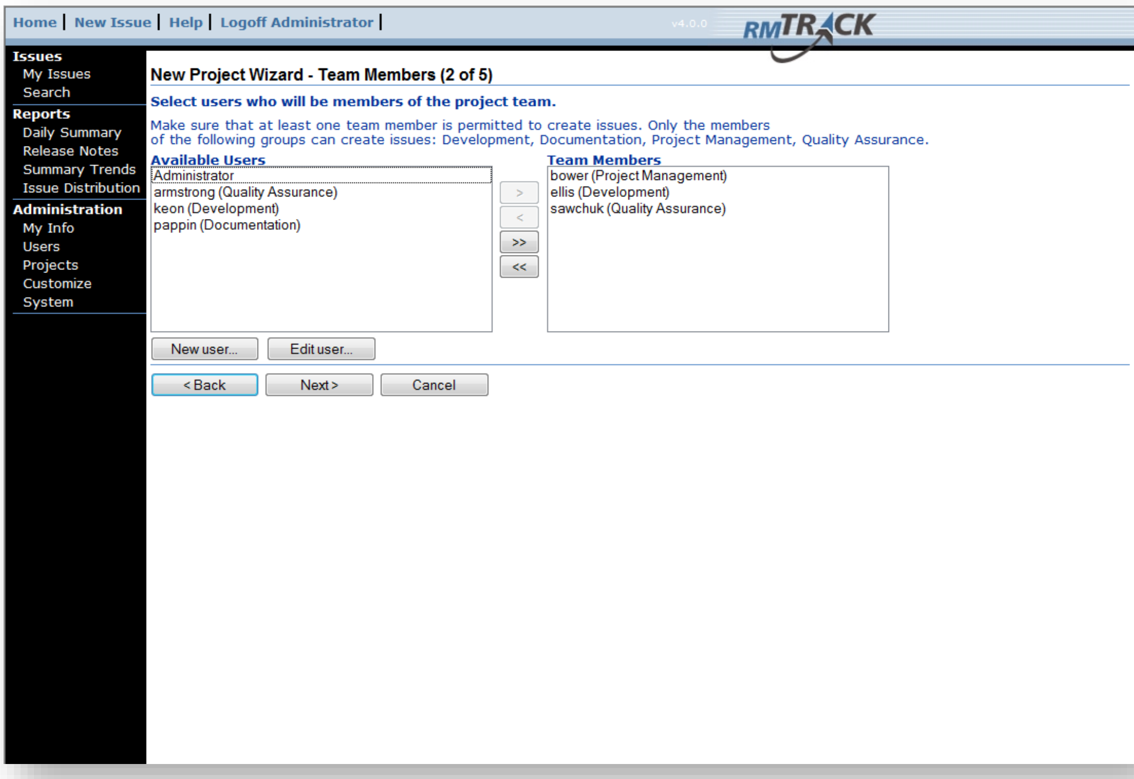
RMTrack allows for two type of issue numbering, either uniquely across all projects or sequentially within projects. If your installation numbers issues sequentially within project, you must provide a **Numbering Prefix** for each project. The prefix can be up to 10 characters long and helps identify the project of an issue. For example, you could set a project’s numbering prefix as **“P1-”** and each issue number would begin with that prefix e.g. P1-1, P1-2…P1-999. For more information on the numbering of issues please refer to the section **Issues Numbering** under **Site Options** in this guide.

Projects can be designated as having **Public Access** by checking the **Enabled** checkbox. For more information, please refer to the section **Public Access Projects** in this guide.

Each project must be assigned a **Data Entry Form** for its issue details page. The Data Entry Form dropdown will list all defined forms. For more information, please see the section on **Data Entry Forms** under the **Customization** section of this guide.

Each project must be assigned a **Workflow Configuration**. The Workflow Configuration dropdown will list all defined workflows. For more information, please see the section **Workflows** under the **Customization** section of this guide.

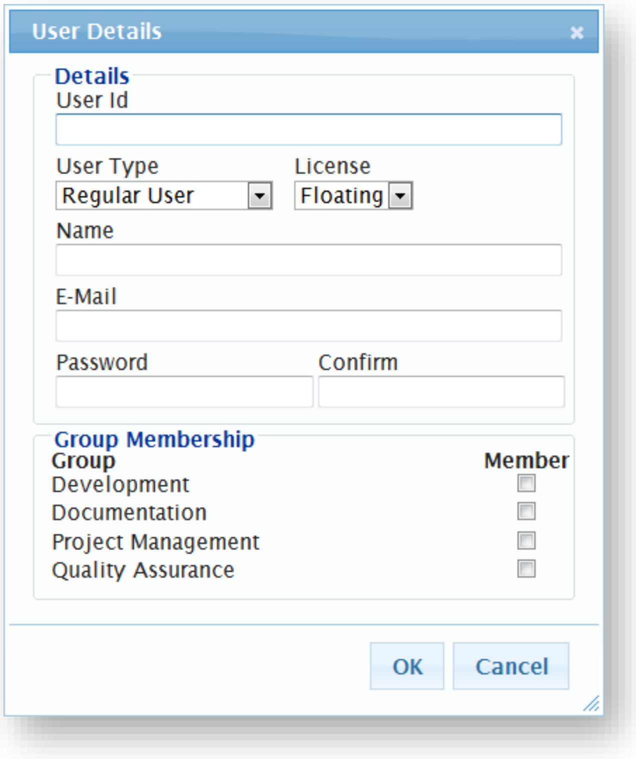
Project Wizard - Team Members



A list of existing users is displayed on the left side. Use the > arrow button to move a selected user to the Project Team list on the right side. Use the < arrow button to remove users from the team. The >> and << buttons will add or remove all users from the project.

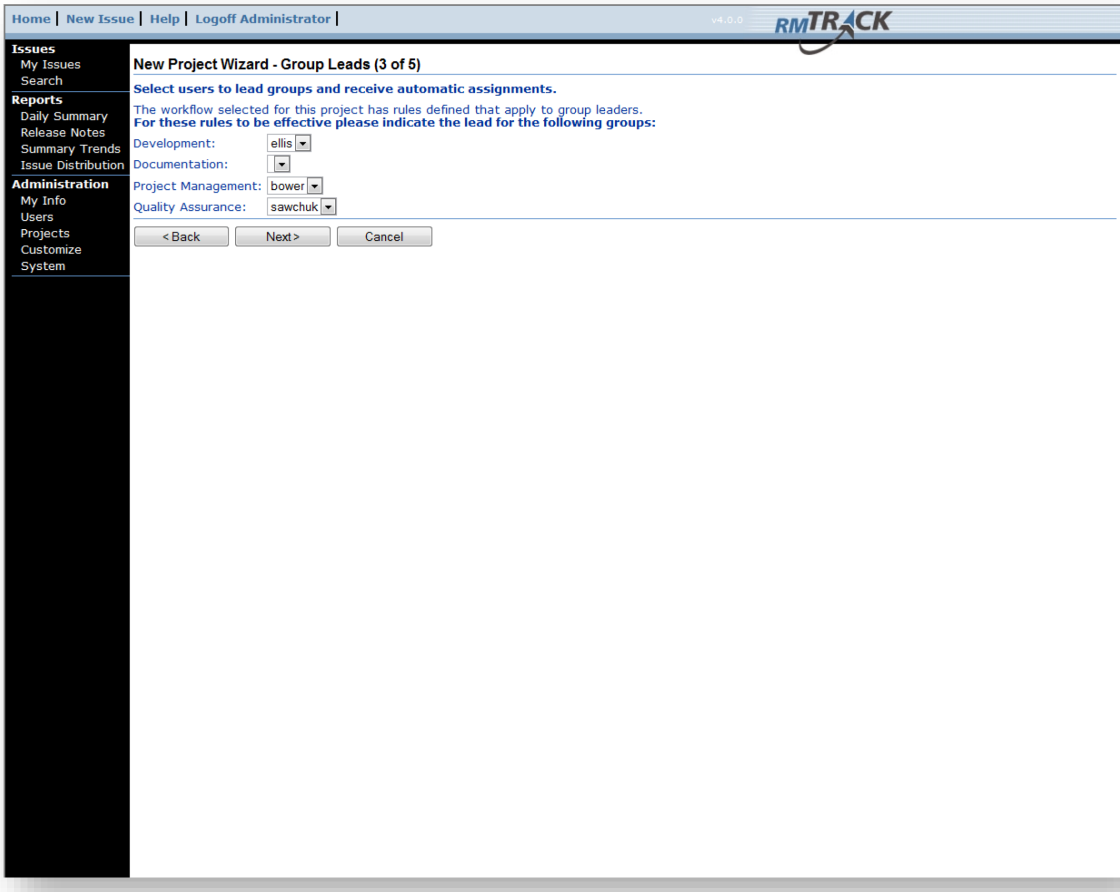
Use the **New user…** button to create new users from within the Project Wizard.

Use the **Edit user…** button to edit a selected user.



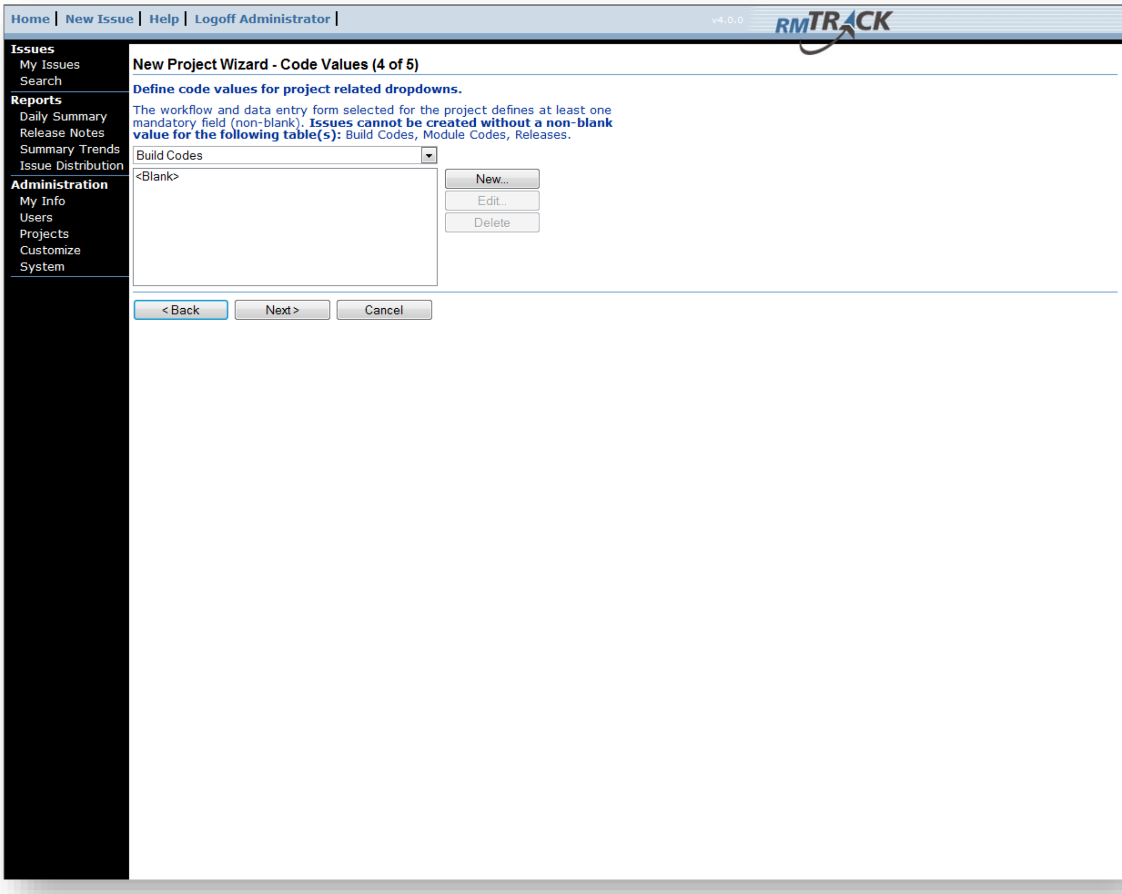
For more information creating and maintaining users, please refer the sections under **User Menu** in this guide.

Project Wizard - Group Leads



Group Leads are used in RMTrack to allow automatic assignment of issues. If the workflow selected uses group leads, you can enter them here. The dropdowns will contain all users who were assigned to the project team and are members of the group. Group leads are not mandatory. For more information, please see the section **Workflows** under the **Customization** section of this guide.

Project Wizard - Codes Values

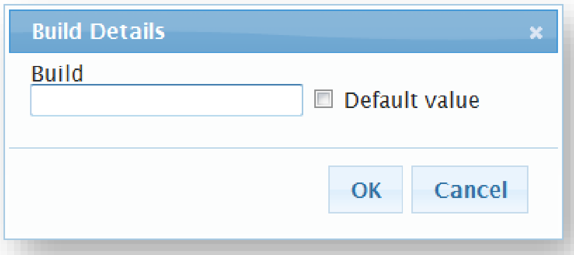


RMTrack uses code tables for dropdown type issue fields. These code tables can be global (the same values for all projects), or they can be project related code tables (each project has unique values). This section of the Project Wizard allows you to add values to project related code tables for this project. For more information, please refer to the sections **Code Tables** and **Project Related Code Tables** in this guide.

The dropdown will contain all code tables that have been defined as project related. Values for code tables are not mandatory, however if the project's selected workflow has rules designating any of these dropdown fields as mandatory, at least one value will be required to create an issue or successfully move an issue through the workflow.

Dropdowns that require a value based on the workflow are listed in the description.

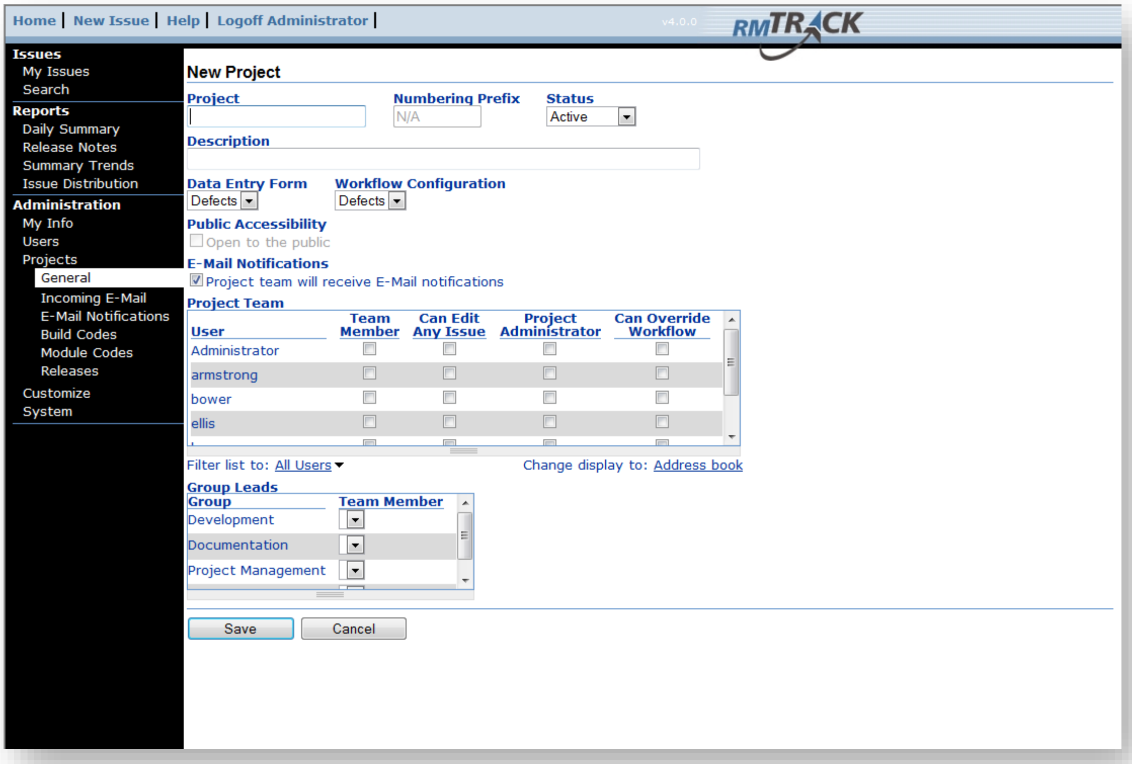
To add values to a code table, select the code table from the dropdown and click **New…**



Project Wizard - Finish

When all necessary information to create the project has been entered you will arrive at the Finish page. Information can be inspected for accuracy here. When all information is correct click the Finish button to create your project.

Project Details



Modify and Copy Existing Projects

To modify a project, click its name on the Projects List page. This will open up the Project Details page, where the project description, group leads and team members can be altered as required.

For existing projects there is a **Copy…** link beside the Project name. Clicking this link will copy all project details including:

1. Data Entry Form and Workflow association
2. Project Team Members
3. Group Leads
4. All project related code table values
5. All project level e-mail notification rules

Project Code

This is the name of the project that will appear in all dropdowns and references to the project. The code can be up to 50 characters long however names that long may affect the display on some pages. It should be descriptive enough that users will recognize which project it is without being excessively long.

There is also a field for **Description** that can be used to provide a longer description of the project and can be used in custom reports if desired.

Numbering Prefix

RMTrack allows for two type of issue numbering, either uniquely across all projects or sequentially within projects. If your installation numbers issues sequentially within project, you must provide a **Numbering Prefix** for each project. The prefix can be up to 10 characters long and helps identify the project of an issue. For example, you could set a project's numbering prefix as "**P1-**" and each issue number would begin with that prefix e.g. P1-1, P1-2…P1-999. For more information on the numbering of issues please refer to the section **Issues Numbering** under **Site Options** in this guide.

Status

Often, projects have a "life cycle". When a project ends it may still be desirable to keep the issues associated with the project as an archive. There are three settings for Project Status:

- **Active**: This is the normal functioning state of a project.
- **Read Only:** This setting allows the project to be kept for inquiry purposes. The issues are still visible to all team members of the project but regular users can no longer create or update issues in the project. Site Administrators and the API can still create and update issues. The project and its issues are still accessible by reports.
- **Disabled:** This setting allows a project to be kept as an archive. When a project is disabled, the issues are no longer visible to any user, including Site Administrators. But they project and its issues are still "there". The project will not appear anywhere in the system and is not accessible by reports. In the event that information is required from a disabled project, the Site Administrator simply needs to change the status back to Read Only.

Data Entry Form

Each project must be assigned a **Data Entry Form** for its issue details page. The Data Entry Form dropdown will list all defined forms. For more information, please see the section on **Data Entry Forms** under the **Customization** section of this guide.

Workflow Configuration

Each project must be assigned a **Workflow Configuration**. The Workflow Configuration dropdown will list all defined workflows. For more information, please see the section **Workflows** under the **Customization** section of this guide.

> **WARNING: Changing the workflow for an existing Project can cause unexpected problems. Please see the section *Changing the Workflow for Existing Projects* in the Workflows section of this guide.**

Public Access Projects

Projects can be designated as having Public Accessibility by checking the **Open to the Public** checkbox. A public access project means that anyone with access to your RMTrack server will have access to this project. If they do not have a User ID, they will be able to create one for themselves from the Login page.

You must designate a Security Type as the default type for public users. Security types are designated as **Public** from the Security Type details page. When public users create their own IDs, they will be automatically set to that Security Type.

You must designate at least one group as the **Public** group. When public users create their own user IDs, they will be automatically assigned to that group. Groups are designated as **Public** on the Group Details page. As with regular users, the workflow rules for a public user are controlled by the group the user is assigned to. Depending on the level of access you wish to grant public users it may be necessary to create a new group specifically for them.

Public users will have access to all projects designated with public accessibility and will only have access to public projects.

Project Team

You can also designate your project team on this page by checking the applicable boxes in the Project Team section. Each user can be designated as:

- Team Member: Has access to issues in the project and can update issues that are assigned to them.
- Can Edit Any Issue: Can update any issue in the project, even when it is not assigned to them.
- Project Administrator: Can update any issue in the project, add project related code table values, and add users to the project.
- Override workflow: Allows the user to by-pass all workflow rules for this project. Not recommended for regular users.

NOTE: At least one team member, typically the project manager, should be designated as the Project Administrator allowing them to modify the project's team member list and to modify project code tables.

The Project Team selection list can be toggled between **All Users**, **Only Team Members** or **Members of Group.** The Members of Group selection filters on a selected group and can be useful when you want to add all or most members of a particular group. The list can also be toggled between a **Full list** and **Address book** styles.

Group Leads

Group leads are used in RMTrack to allow automatic assignment of issues. The dropdowns will contain all users who were assigned to the project team and are members of the group. The list of groups shown will only include groups that use the Group Lead feature in transitions in the project's selected workflow. Group leads are not mandatory. For more information, please see the section **Workflows** under the **Customization** section of this guide.

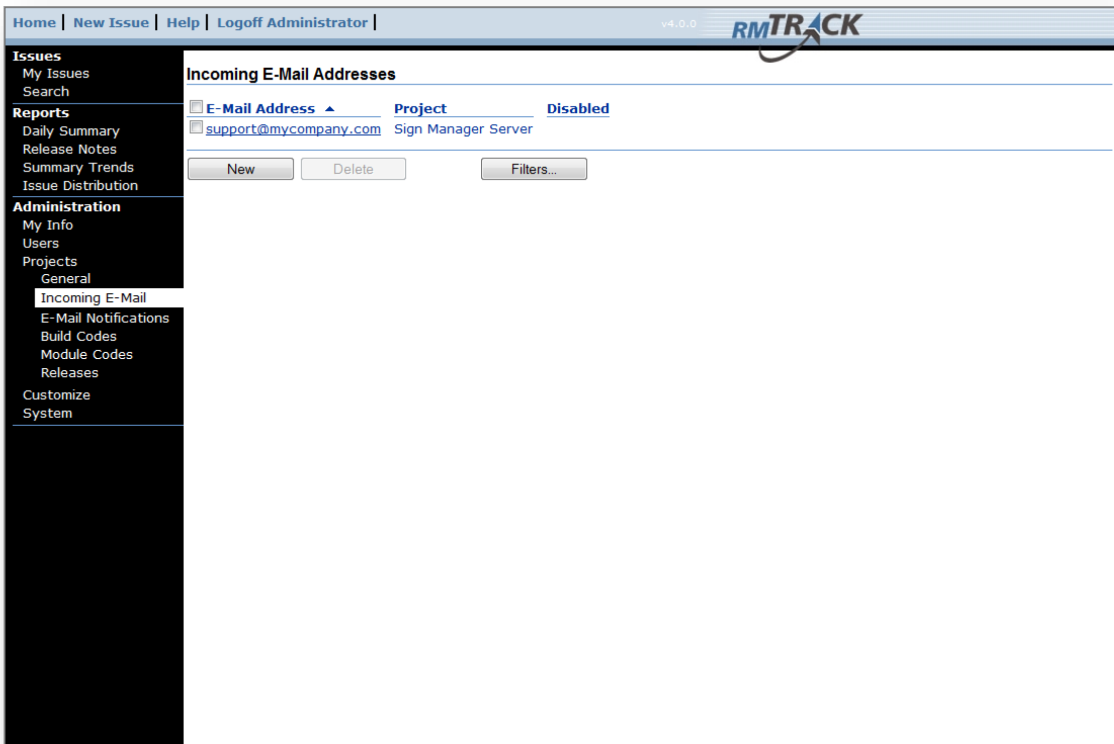
Incoming E-Mail

RMTrack is able to monitor an e-mail address and create issues from e-mails sent to that e-mail address. This allows non-RMTrack users to create issues in RMTrack.

> **NOTE: The Incoming E-Mail process is run by a background service created when RMTrack is installed called "RMTrack Job Scheduler". This service also runs outgoing e-mails (notifications), issue escalation, and the integrated database backup.**

Multiple e-mail addresses can be monitored. Each address will be mapped to a single project. To create issues in multiple projects, you will need to set up multiple incoming e-mail addresses.

List of Incoming E-Mail Addresses



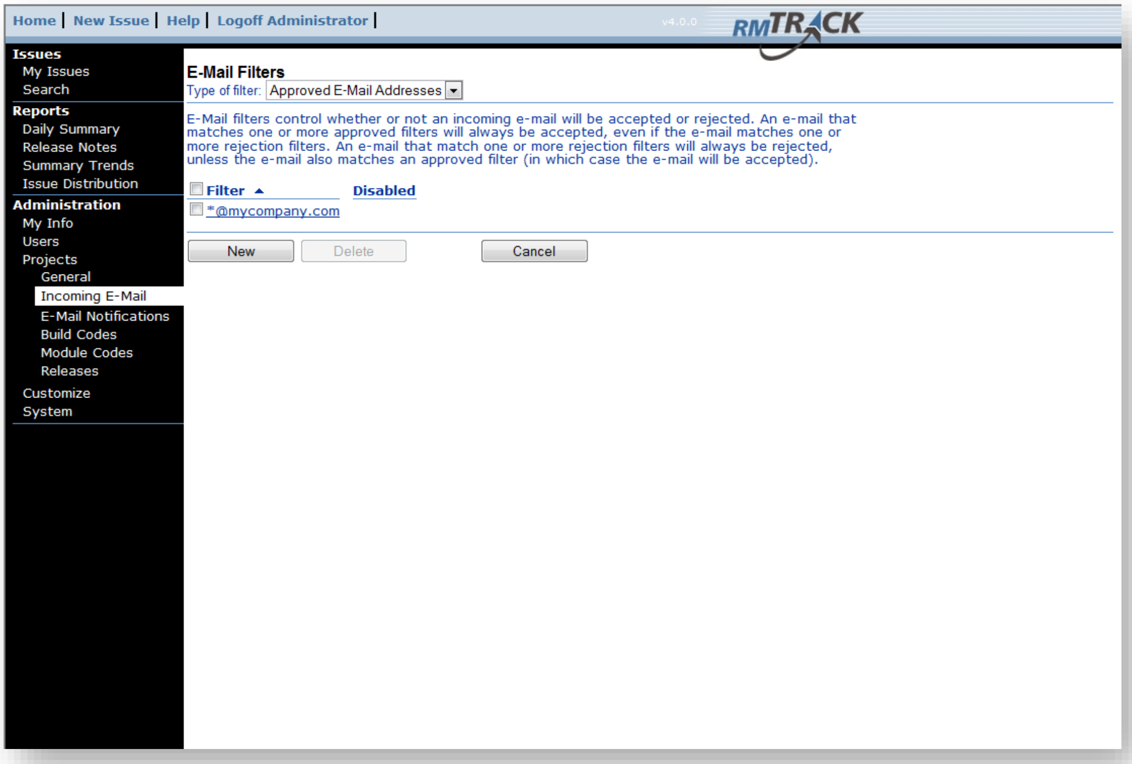
To add an Incoming E-Mail Address, click the **New** button. To delete an Incoming E-Mail Address, check the box to the left of the e-mail address and click the **Delete** button. To modify an Incoming E-Mail Address, click on the e-mail address.

To setup **Filters** for incoming e-mails, click the **Filters…** button.

Filters for Incoming E-Mail

E-Mail filters control whether or not an incoming e-mail will be accepted or rejected. There are four filters available:

1. Approved E-Mail Addresses
2. Approved Subject Lines
3. Blocked E-Mail Addresses
4. Blocked Subject Lines



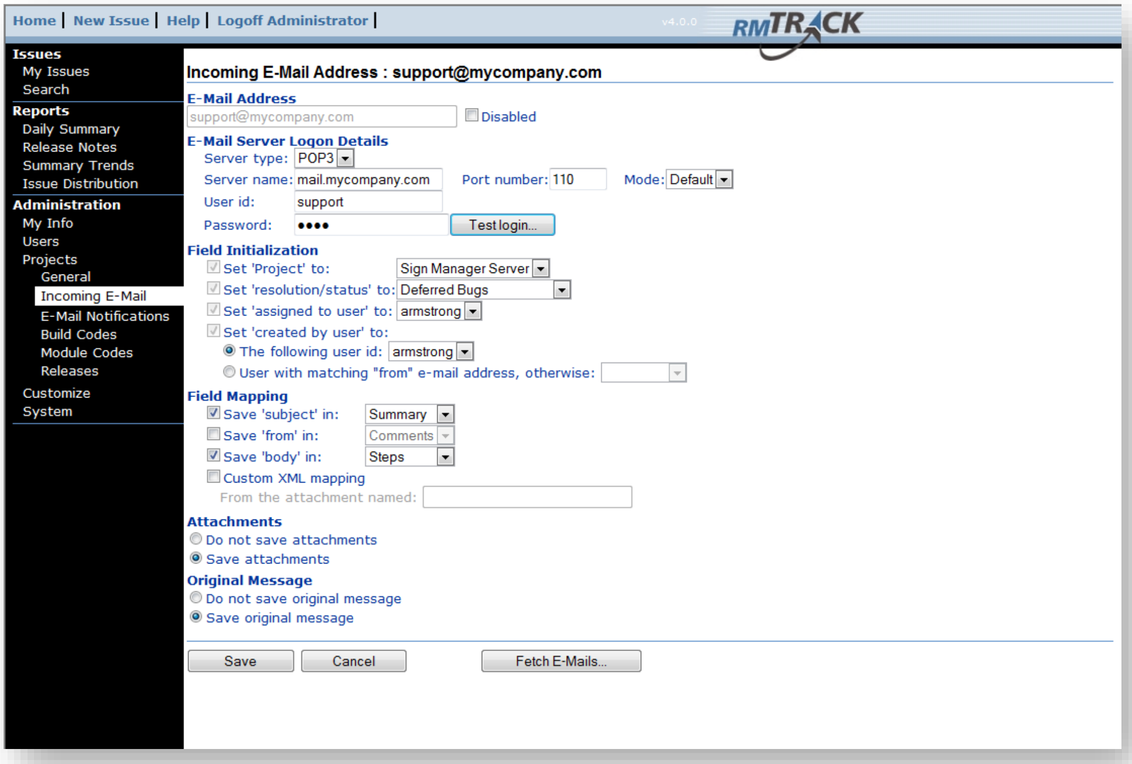
An e-mail that matches one or more **Approved** filters will always be accepted. An e-mail that matches one or more **Blocked** filters will be rejected unless it also matches an approved filter (the approved lists take precedence).

Without any blocked filters defined, everything is accepted. Only having an **Approved** filter will not change anything – you also need a **Blocked** filter.

You can use wildcards (*) in the filter. For example an **Approved E-Mail Addresse**s filter with ***@rmtrack.com** will accept any e-mail from anyone at **rmtrack.com**.

A common use of this feature would be to create a **Blocked E-Mail Addresses** filter that contains * (this will block all e-mails from all addresses) then create an **Approved E-Mail Addresses** filter with ***@yourclient.com**. This will allow e-mails from your client's domain only.

Incoming E-Mail Addresses Details



E-Mail Server Logon Details

Each incoming e-mail address must have the associated server logon information to allow RMTrack to access the incoming e-mail.

RMTrack supports POP3 and IMAP server types and supports security protocols of: None (default), SSL and TLS.

The server name (or IP address), a User id, and (depending on your mail server protocols) a password need to be provided.

There is a **Test login…** button to verify the connection settings for the mail server.

Field Initialization and Mapping

For each incoming e-mail address you must map the e-mails to:

1. A **Project**

   NOTE: Multiple e-mail addresses can be mapped to the same project. This allows e-mails sent to different addresses to be mapped differently in the same project.

2. A **Resolution State**
3. An **Assigned to user**
4. A **Created by user**
   a. *Created by user can be set to a valid user from the user dropdown list*

b. *Or RMTrack can attempt to match to an existing user based on e-mail address. If no match is found the "otherwise" user is used.*

There are three fields from the e-mail that you can map directly to RMTrack fields:

1. Subject --> (your choice of RMTrack fields)
2. From --> (your choice of RMTrack fields)
3. Message Body --> (your choice of RMTrack fields)

Custom XML Mapping

RMTrack also allows for complex field mapping to be accomplished by using an .XML file attached to the incoming e-mail. By checking the Custom XML mapping box and providing a file name for the XML attachment, RMTrack will read the XML file and use it to create the issue. The XML file must use the following format:

```
<?xml version="1.0" encoding="windows-1252" ?>
<rmt:Fields xmlns:rmt="urn:RMTrackEMailAttachment">
<FIELDNAME>VALUE</FIELDNAME>
</rmt:Fields>
```

- Supports only Text, Comments, and Dropdowns.
- If a dependent dropdown is specified its parent value(s) must also be specified.
- Dropdown values that do not exist are set to the default value for the dropdown.
- Text fields that exceed the length limit for the field will be truncated and "&trimmed" will be added.
- Comment fields that exceed the 4000 length limit will be truncated and "&trimmed" will be added.
- Code table fields that exceed the 50 length limit will be truncated (without the "&trimmed" message appended).

Attachments

You can choose to keep attachments from the e-mail and make them attachments on the issue and/or the entire original incoming e-mail can be made an attachment on the issue.

Fetch E-Mails

The RMTrack Job Scheduler background service will check for new incoming e-mails every 10 minutes. Clicking the Fetch E-Mails… button will run the process immediately and is useful for testing.

Rejected E-Mails

This button will show a list of e-mails that were rejected by the filtering feature. The Log also contains an option to download any rejected e-mail from the mail server for inspection. Rejected e-mails are deleted automatically after 30 days.

NOTE: Any e-mails that are picked up where the "TO:" e-mail address does not match the configured e-mail address will be rejected.

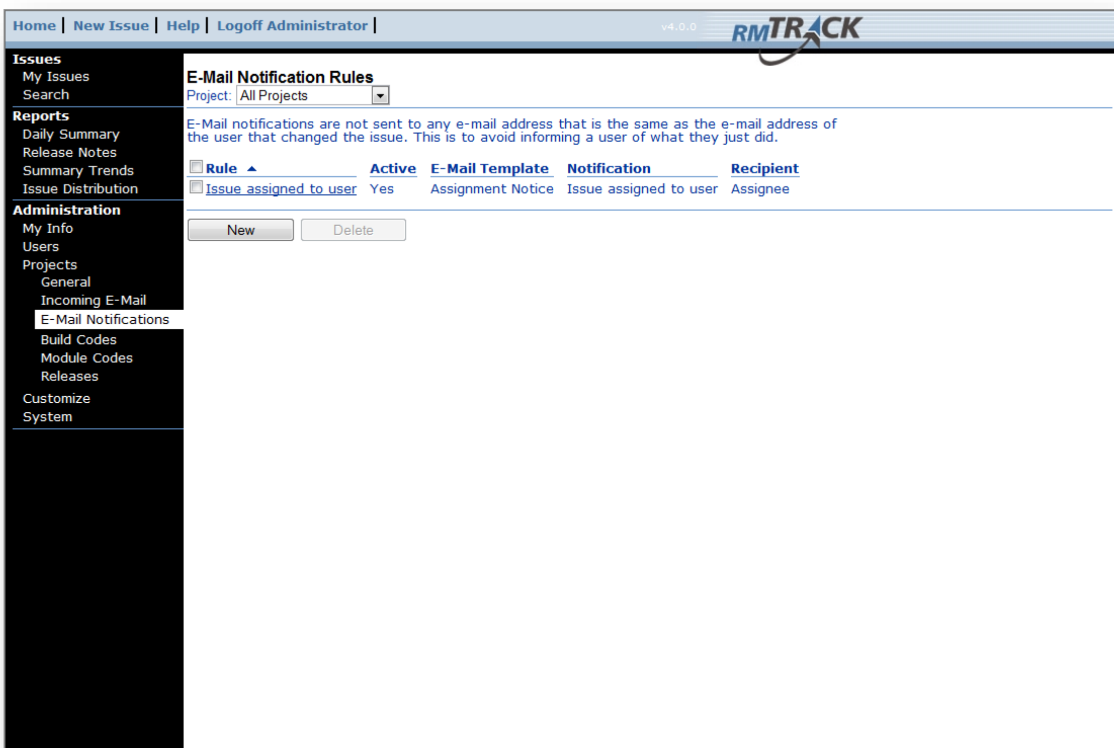
E-Mail Notifications

RMTrack allows you to designate people to automatically receive e-mail notifications, using customizable templates, whenever a certain event occurs to an issue. E-Mail notification is controlled by creating e-mail notification rules. A separate rule is required for each event/recipient combination.

> **NOTE: E-Mail notifications require a connection to be created between the RMTrack application and an e-mail server. This connection is configured under *System -> Outgoing E-Mail*. For more information please see the System section of this guide.**

> **NOTE: Individuals can also elect to receive e-mail notifications for specific issues by *subscribing* to the issue. This is done on the issue details page. For more information please refer to the section *E-Mail Subscriptions* under Site Options in this guide and to the section *Subscribing to an Issue* under *Working with Issue Details* in the User Guide.**

List of E-Mail Notification Rules

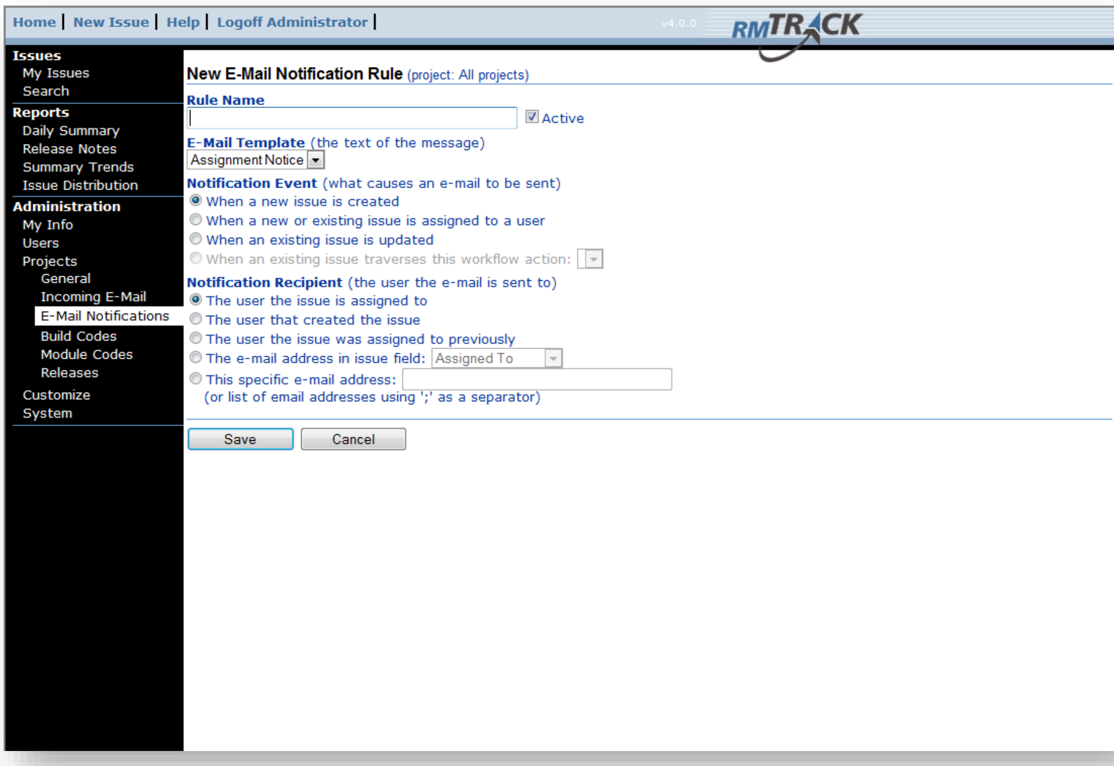


E-Mail notification rules can apply to a specific project or to all projects. To add e-mail notification rules choose the desired project (or All Projects) from the project drop-down then click the **New** button. To delete a rule, check the box to the left of the rule's name and click the **Delete** button. To modify a rule, click its name on the E-Mail Notification page. This will open up the E-Mail Notification Rules page, where the rule is defined.

E-Mail Notification Rule Details

NOTE: The user that causes an e-mail notification rule to trigger will not receive an e-mail. In other words RMTrack will not inform a user of an action they performed.

NOTE: Each user will only receive one e-mail per event. If an event triggers multiple rules that send e-mails to the same user, only one will be sent. The exception is a rule that uses a recipient type "The e-mail address in Issue field" or "This specific e-mail address" - these rules will always trigger.



Each e-mail rule must be given a unique name. The format and text of the e-mail sent is controlled by the **E-Mail Template** selected from the dropdown list. You must have previously defined and saved your templates. For more information, please see the section **E-Mail Templates** in this guide.

Each rule must have an **event** and a **recipient.**

Choose a **Notification Event** by clicking the appropriate radio button. This is the event that will cause this particular notification rule to be triggered. If the event is a **workflow action**, you must select the desired workflow action from the dropdown list.

NOTE: Notification rules based on a workflow event can only apply to specific projects not to *All projects*.

Choose a **Recipient** for the e-mail by clicking the appropriate radio button.

Project Related Code Tables

Below the heading **E-Mail Notifications** under **Projects** in the left side menu is a list of any **Project Related Code Tables** defined in RMTrack. These are code tables (drop down fields) that have different values for each project. Clicking on each **Code Table** name will allow that code table to be updated. For more information, please see the section **Code Tables** in this guide.

Customization Menu

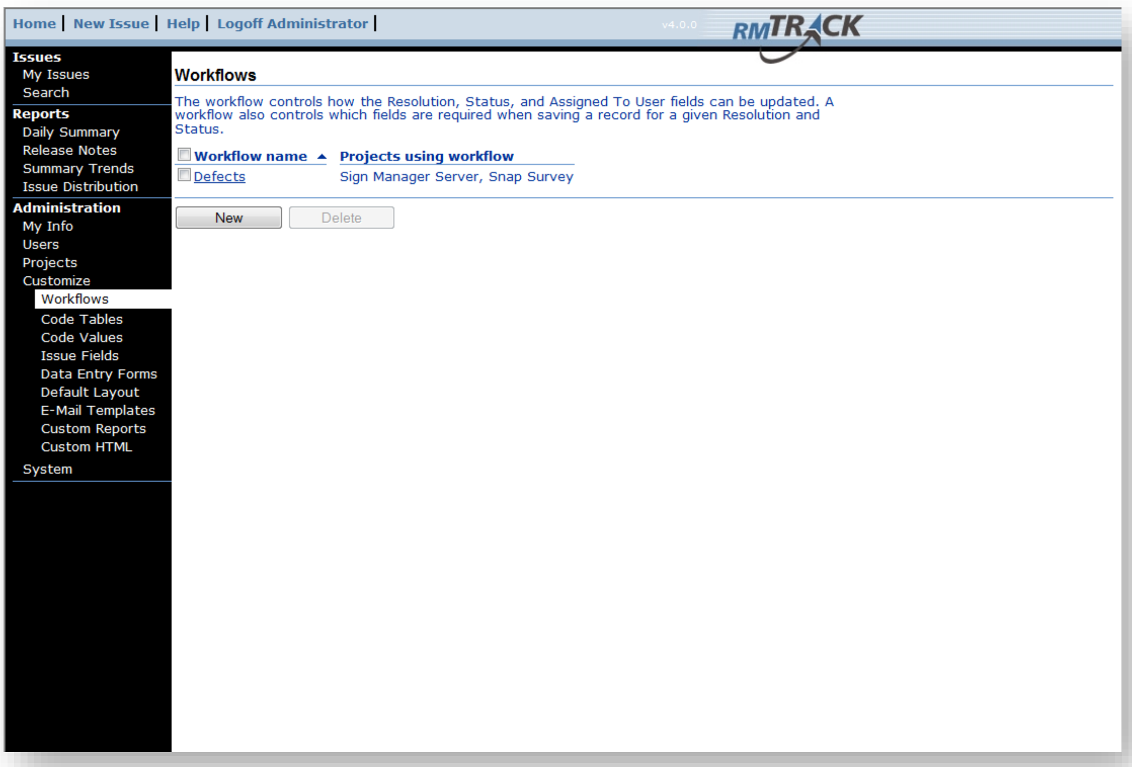
Workflows

Workflows are the process (or path) that an item follows while being tracked in RMTrack. Normally this process goes from creation to completion but some workflows are cyclical in nature, for example a maintenance schedule.

The workflow configuration controls what group an issue can be assigned to, the valid values for the resolution and status fields, and basic data entry validations.

Each project in RMTrack can have a separate workflow allowing each project to have its own rules and process.

Workflows List



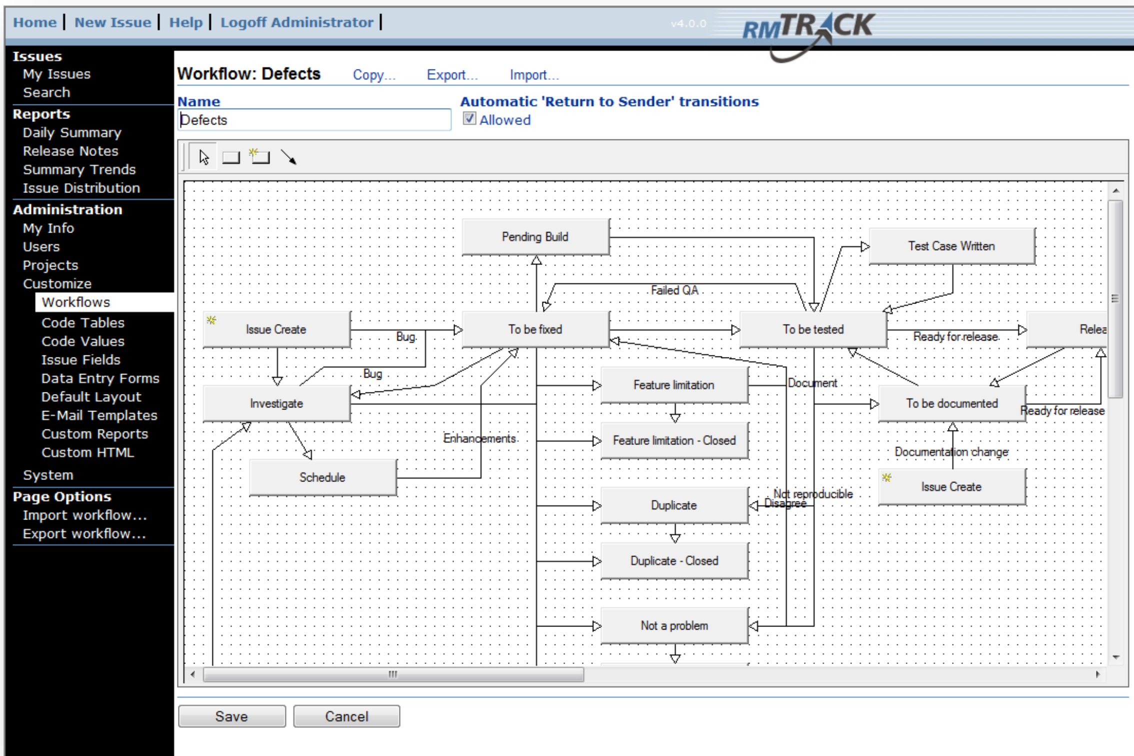
Beside each Workflow name is a list of Projects currently using that workflow configuration.

To add a workflow, click the **New** button. To delete a workflow, check the box to the left of the workflow name and click the **Delete** button. To modify workflow, click its name.

Workflow Configuration

The first step in customizing or creating your own workflows should be to map your organization's process workflow out on paper or through the use of a drawing application like Microsoft Visio. Take into consideration the following:

- What are the roles (Groups) of the users involved in the process?
- Who can create issues?
- Does someone need to review all issues before assigning them?
- What is the process to resolve the issue?
- Who can close an issue?
- Who determines whether an issue can be deferred? Or is a duplicate?



Workflows can be copied by using the **Copy…** link at the top of the page beside the workflow name. It is often a good idea to start a new workflow with a copy of an existing workflow to modify.

Workflow Export/Import

Workflows can be exported and imported using the **Export…** and **Import…** links at the bottom left of the page or at the top beside the Copy… link. Exporting and Importing Workflows is provided mainly as a means of moving workflows from a test environment to a live environment.

NOTE: The Groups must match in the two environments when exporting and importing workflows or the import will fail.

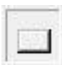
Return to Sender

RMTrack workflows can include a **Return to Sender** option at all resolution states. This means that at any resolution state, the user the issue is assigned to has the option of sending the issue back to the previous user and resolution state. This option can be turned off for any workflow by un-checking the box beside the workflow name.

Workflow Diagram Drawing Tools

At the top of the workflow diagram area is a set of four buttons:

The first arrow is the selector tool. Use this tool to select other objects in the diagram.

 The plain rectangle is the tool for drawing resolution states. Select this tool, click on the diagram area and drag to create a resolution box.

 The rectangle with the * is the tool for drawing Issue Create boxes. Select this tool, click on the diagram area and drag to create a resolution box.

 The last arrow is the tool for drawing transitions. Select this tool, click on an existing Issue Create box or Resolution box and drag to another resolution box to create a transition.

Positioning the mouse over the diagram background and right-clicking mouse displays a context menu for the basic diagram:

The diagram menu options are:

- Show Grid – to display a drawing grid.
- Snap to Grid – to aid in positioning objects on the page.
- Zoom – to 'zoom' in or out on the workflow.

Positioning the mouse over an object on the diagram and right-clicking the mouse displays a menu specific to that object.

For Issue Create boxes and Resolution State boxes the menu options are:

- Bring to Front – for overlapping objects.
- Send to Back – for overlapping objects.
- Delete – to remove the object.
- Properties – to display/modify the properties of the resolution state.

For the Transition arrows the menu options are:

- Reverse Direction – to reverse the (arrow) direction of action.
- If the states being connected are not in a direct line, it may be desirable to create a 'jointed' or 'curved' line. Select the line with the 'pointer' tool. This will display a 'drag point' mid-line. Drag this point to create a 'bend' in the line. Three options are now available to you on the context menu:
- Direct – straightens the line from one resolution state to the other.

- Straight – displays the line as ‘jointed’.
- Curved – displays the line as ‘curved’.
- Delete – to remove the object.
- Properties – to display/modify the properties of the action.

Workflow Objects

There are three **objects** on the workflow:

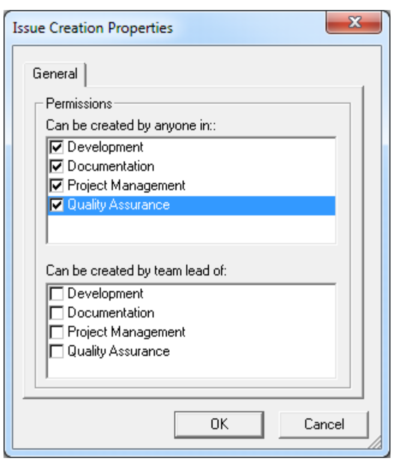
- Issue Creation (box with *)
- Issue Resolution State (regular box)
- Issue Transitions from one resolution state to another (arrows).

When a new object is created, the properties dialogue box for the object is automatically displayed and must be completed. The properties dialogue can also be displayed by double-clicking on an object or right-clicking the mouse and selecting **properties** from the menu.

Issue Creation

Represented on the diagram by a box with a small star * at the top left. There can be more than one issue creation box as there may be more than one entry point into your workflow. For example, you may have one main entry point where all users can create an issue but you may want a second entry point where only managers can create the issue.

The issue creation properties control which Groups are allowed to create an issues:



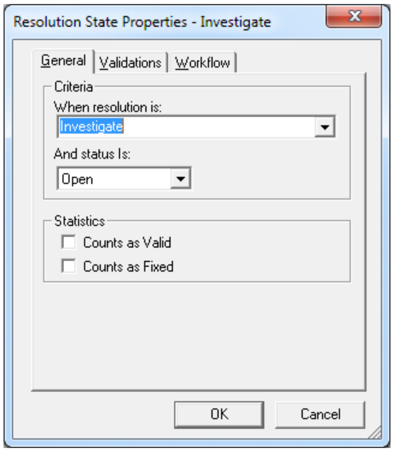
Resolution States

Represented on the diagram by a plain box.

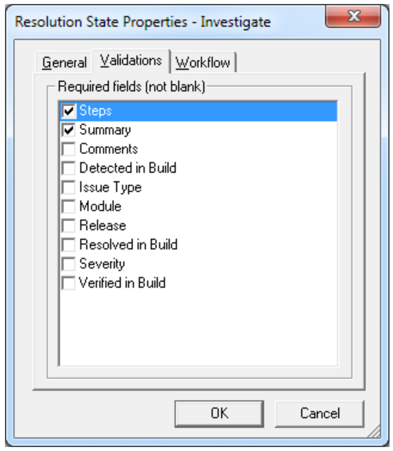
> **NOTE: For more information on deleting, modifying or sorting of existing Resolution Codes, please see the section "Code Table Values" in this guide.**

Properties for a Resolution State have three tabs:

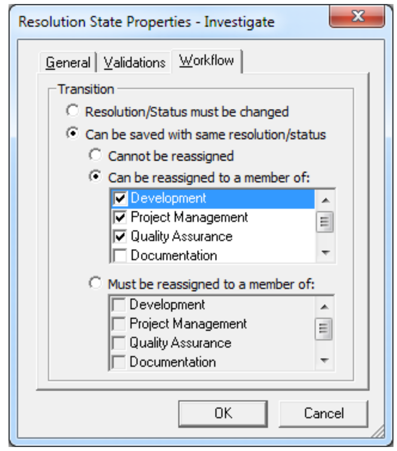
General:



Validations:



Workflow:



General:

On the General tab you can either select an existing resolution code from the dropdown or create a new resolution code by typing the name into the field. Select whether the status is open or closed – a combination of the resolution code and the status becomes the **Resolution State**.

Indicate whether the issue is to be counted as a valid issue and/or a fixed issue by checking the appropriate boxes. These indicators can be used by RMTrack for issue filtering and for metrics reporting. Generally, a valid issue is one that represents a real problem i.e. not a duplicate or a non-reproducible issue. A fixed issue is one that has been solved, verified and is ready to be closed.

Validations:

On the Validations tab you are able to define which fields on the data entry form are mandatory when an issue is moved to this resolution state for. New (or different) required fields can be added at different stages in the workflow. On the issue details page, required fields are indicated by an asterisk (*) beside the field name.

> **NOTE: Mandatory field rules will not be enforced on automatic transitions or if the user does not have update privileges to the field due to group membership.**

Workflow:

The Workflow tab controls the rules for resaving an issue that is already in this resolution state:

- The issue cannot be saved in this resolution state i.e. it must be moved to a new resolution state to save it.
- It can be saved in the same resolution state but:
- The issue cannot be reassigned i.e. the user the issue is assigned to can update it without moving it in the workflow but it must remain assigned to them.
- It can be re-assigned in the same resolution state to any member of the indicated group(s).
- It must be reassigned to a member of one of the indicated group(s) to be saved in this resolution state i.e. the assigned to must be changed.

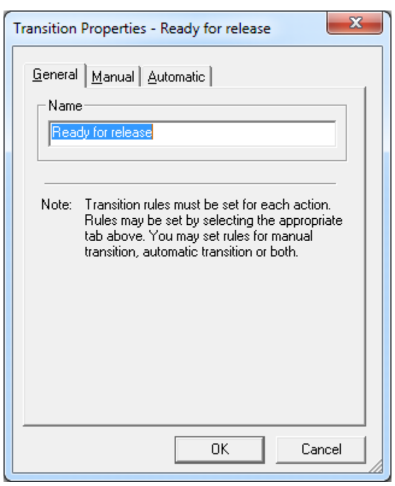
Transitions

Represented by the connecting lines and arrows.

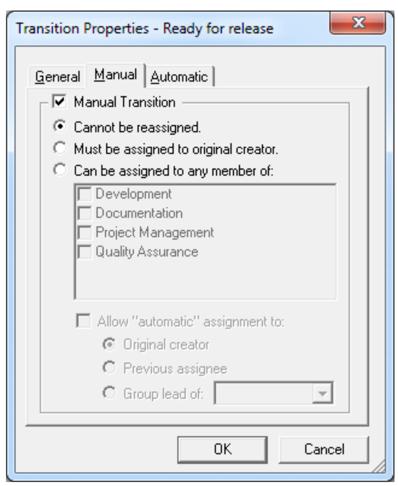
Transitions can be **manual** which require the issue to be moved from one state to the other by a user, **automatic** where the system will transition the issue after a defined amount of time, or a combination of both. Manual transitions are depicted by a solid line. Automatic transitions (and combinations) are depicted by a dashed line.

The transition properties have three tabs:

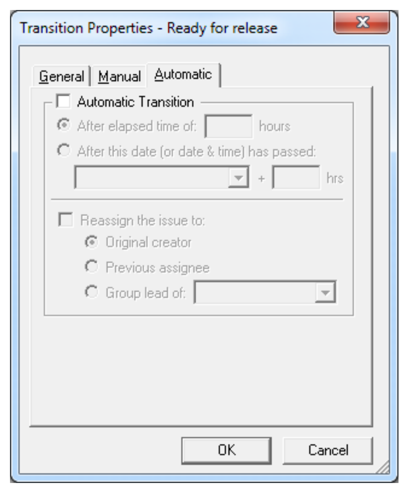
General:



Manual:



Automatic:



General:

The properties dialogue box for actions includes a name. An action can be tagged with any appropriate name; typically it's one that explains the action being taken. Names for actions are not mandatory and only appear as reference on the Workflow diagram and in the E-Mail Notification Rules setup.

There are two types of transitions; manual and automatic. Rules must be set for at least one type of transition (an action can have both manual and automatic rules).

Manual Transitions

Manual transitions are transitions that occur when a user moves an issue from one resolution state to another. To set rules for manual transitions check the Manual Transition box on the Manual tab.

The assignment properties are used to determine who the issue can be assigned to after the manual transition is completed. The available options are:

- Cannot be reassigned – the issue's current owner must remain the owner after the transition.
- Must be assigned to original creator - indicates that the issue must be assigned back to the user that originally created the issue.
- Can be assigned to any member of: - issues can be assigned to any member of the indicated group(s).
    - Allow "automatic" assignment to - automatic assignments will appear as the default choice in the Assign to: dropdown when the resolution is chosen.
        - **Original Creator**: Set the original creator as the default assignee.
        - **Previous assignee**: Set the last person before the current assignee as the default assignee
        - **Group lead of**: Set the lead of the designated group as the default assignee. If there is no group lead designated, there will be no "automatic" choice provided.

Automatic Transitions

Automatic transitions are transitions from one resolution state to another that happen automatically after a certain amount of time has passed. These are generally used to **escalate** an overdue issue. The process is controlled by a background service that, by default, will run every ten minutes to determine if there are any automatic transitions to be performed. To set the rules for automatic transitions select the Automatic tab and check the Automatic Transition checkbox.

Two options are available for the timing of the automatic transition:

- After an elapsed time of: The automatic transition will occur after an issue has remained in its current resolution state for the number of hours entered.
- After this date (or date & time) has passed: The automatic transition will occur after the date (or date and time) contained in the selected field plus the entered number of hours. The date field can be any date/time field in your database.

The issue can remain assigned to the same user (uncheck the **Reassign the issue to:** box. Or the issue can be **automatically reassigned** as follows:

- To the original creator
- To the previous assigned
- To the group lead of the indicated group

WARNING: When using the Assignment options "Original Creator" or "Previous Assignee" it is possible to assign the issue to a user who is no longer a member of the project. If the original creator (or previous assignee) has been deactivated or removed from the project, the automatic transition will still assign the issue to that user.

NOTE: E-mail notification rules and workflow rules go hand-in-hand to allow automatic notifications with workflow transitions. For more information please see the section on E-Mail Notification Rules.

Changing the Workflow for Existing Projects

Special care must be taken when changing the workflow for an existing project. Whether modifying an existing workflow or replacing a project's workflow with an entirely new one, it is possible to create problems.

Some things to consider:

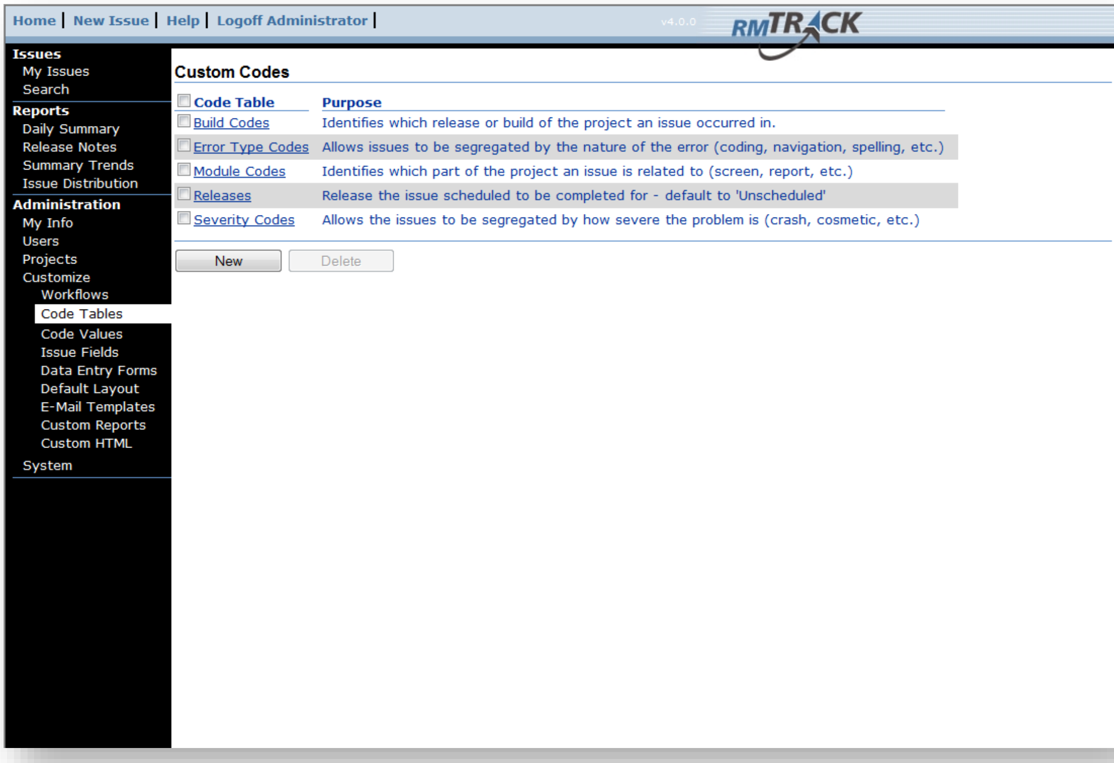
- If issues are in a resolution state that is removed or does not exist in the new workflow they will become orphaned. These issues will have to be moved to a valid resolution state by someone with override workflow project team rights.
- Project level e-mail rules that are dependent on particular workflow transitions will be deleted if the modified/new workflow does not have the transition.
- Groups that are valid issue owners/creators in one workflow may not be valid in another workflow.
- Rules for the internal "Fixed" and "Valid" fields may be different. If an existing project has numerous issues, it may take some time to update these flags based on the new workflow rules.

RMTrack Support recommends the following:

- Always do a backup before making significant changes to the workflow.
- Do not make workflow changes while users are logged on and actively working with issues.
- Create/modify workflows in a test environment first – then migrate the changes to your live environment using export/import workflows.
- Please do not hesitate to contact RMTrack Support for advice and/or help with workflow changes. This service is included as part of your annual maintenance and support agreement.

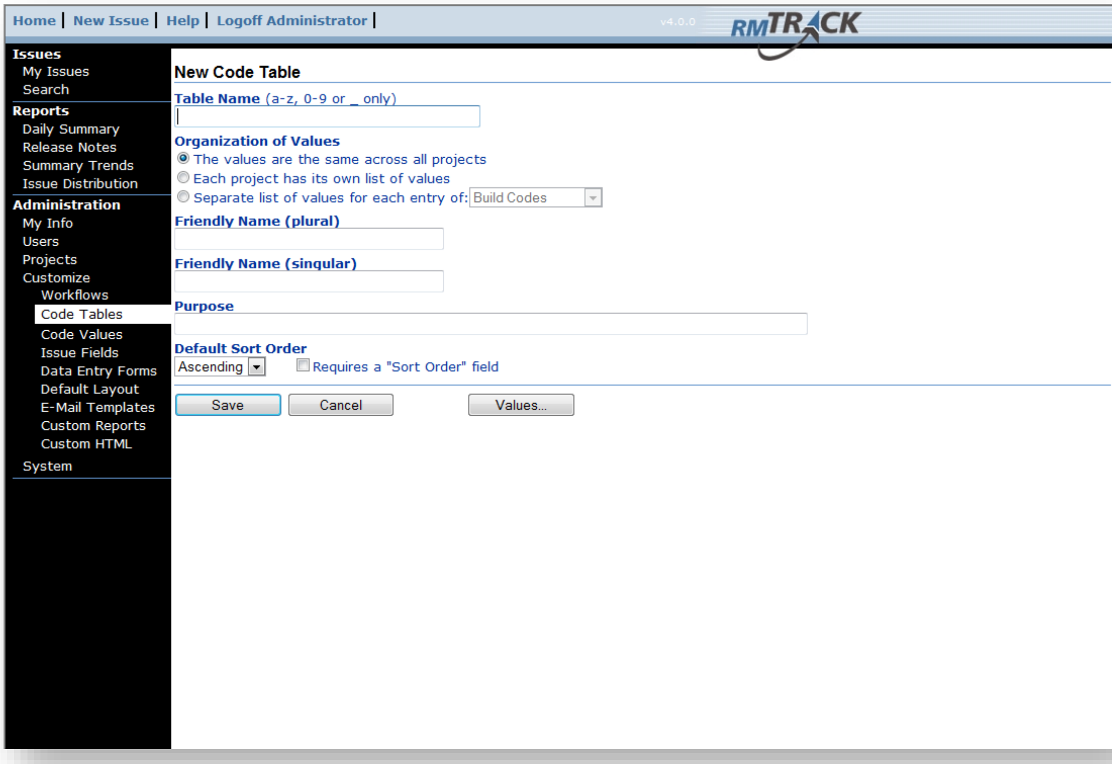
Code Tables

Code tables are used for issue fields where the value must be selected from a pre-determined list of choices, i.e. a dropdown list of values. Code tables must be created first and can then used by a dropdown type issue field.



To add a new Code Table, click the **New** button. To delete a Code Table, check the box to the left of the table name and click the **Delete** button. To modify a Code Table, click on the table name.

Code Tables Maintenance



Naming

Enter a table name in the table name field. You must also provide RMTrack with **friendly** names (plural and singular) for the table. These friendly names are used to display intuitive names to administrators (regular users do not ever see these names). In the purpose field enter a sentence describing the intended purpose of the code table.

Sorting

RMTrack allows you to define a sort order for the code table values i.e. the order they will appear in the dropdown on the data entry form. Sort orders are not required in which case the order will default to alphanumeric. This is especially useful if you have a complex structure for any of your codes, for example the build code or release number. It is recommended that you leave gaps in your sort order numbers so that new values can be inserted. For example use sort orders 5, 10, 15… so that if you wish to add a new value between 5 and 10 you don't need to renumber all the values.

Values

Clicking the **Values…** button will open the list of values for that code table and allow you to add, delete or modify values in the table. For more information, please the section **Code Table Values**.

Organization of Code Values

At the time the code table is defined you must decide if a code value is dependent on another value; either Project or another code table. If a code table's values are not dependent on other values then the code table is considered a global code table.

> **NOTE: Once a code table has been defined its organization cannot be changed.**
>
> **NOTE: If at any time you wish to change the dependency of a code table, please contact *support@rmtrack.com* for assistance.**

Global Code Tables

(The values are the same across all projects)

A global code table contains a single list of values that apply across all projects. When added to the data entry form as a dropdown field, the list of values will be presented so that the user can select one value to appear in that field.

An example of a global code table would be Issue Severity with value of HIGH, MEDIUM and LOW that relate to all issues.

Project Related Code tables

(Each project has its own list of values)

Project related code tables have a different set of values for each project. When added to the data entry form as a dropdown field, the list of values for the chosen project will be presented and the user can select a value to appear in the field. Note that the Project field appears on all data entry forms i.e. every issue must be associated with a project. Changing the project of an issue will cause a different set of values to be presented in any project related dropdown.

Examples of project related code tables might be Build Codes or Modules where each project has its own set of values.

Dependent Code Tables

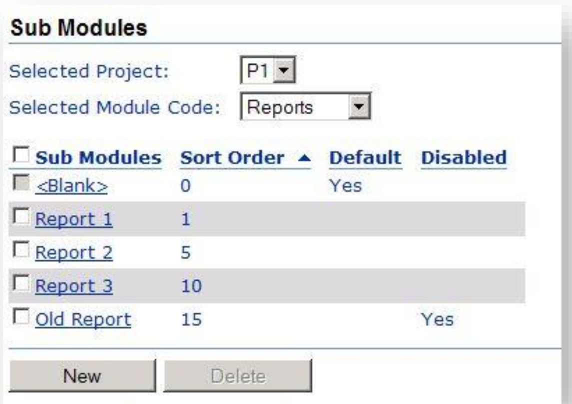
(Separate list of values for each entry of :)

Code tables can also be defined as dependent on another code table. Like project related code tables which are dependent on the project selected, dependent code tables depend on the value selected in another code table. When added to the data entry form the code table they depend on must also be present in the form. Selecting a value from the dropdown of the top level changes the values presented in the dependent dropdown.

Dependent code tables can be dependent on a global code table, a project related code table or another dependent code table. This allows for multi-level dependencies to be defined. For example a code table called Modules can be dependent on the Project, and a Sub-Modules code table can be dependent on Modules.

Code Table Values

The values pages for code tables can be accessed from the left side menu. Under the Customization menu item, clicking Code Values will display a list of all code tables except Project related code tables. Project Related Code tables are displayed under the Project Menu heading.

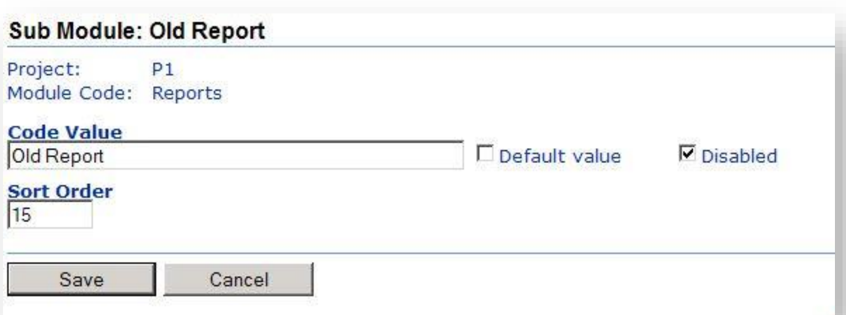


For dependent code tables, dropdowns are provided to select values for each higher level table. For example, the above **Sub Modules** table is dependent on **Modules** which is dependent on **Project.** To enter Sub Module values you must first select the Project, and then select a Module from that Project's list.

New values can be added to a code table by clicking on the **New** button. Code table values can be deleted by checking the box beside the value and then clicking the delete button.

> **NOTE: Values can only be deleted if they are not currently being used by an issue.**

Existing values and sort order can be modified by clicking on the value.



> **NOTE: If an existing value is changed it will also be changed in any issue that it currently appears in.**

Default Value

Each code table must have a default value specified. This is the value that will initially appear in the field when creating a new issue. When you create a new code table an initial value, <blank>, will be automatically added to the table and designated as the default. When you add additional values to the table, you can designate one of these as the default. Each code table must have at least one value. The <blank> value can be removed after adding new values.

Disabled Value

Disabling a value stops that value from appearing for selection in the dropdown list on the issue details page, meaning that it cannot be selected for new issues and existing issues cannot be changed to that value. Issues that already use the disabled value will not be affected.

Resolution Code Table

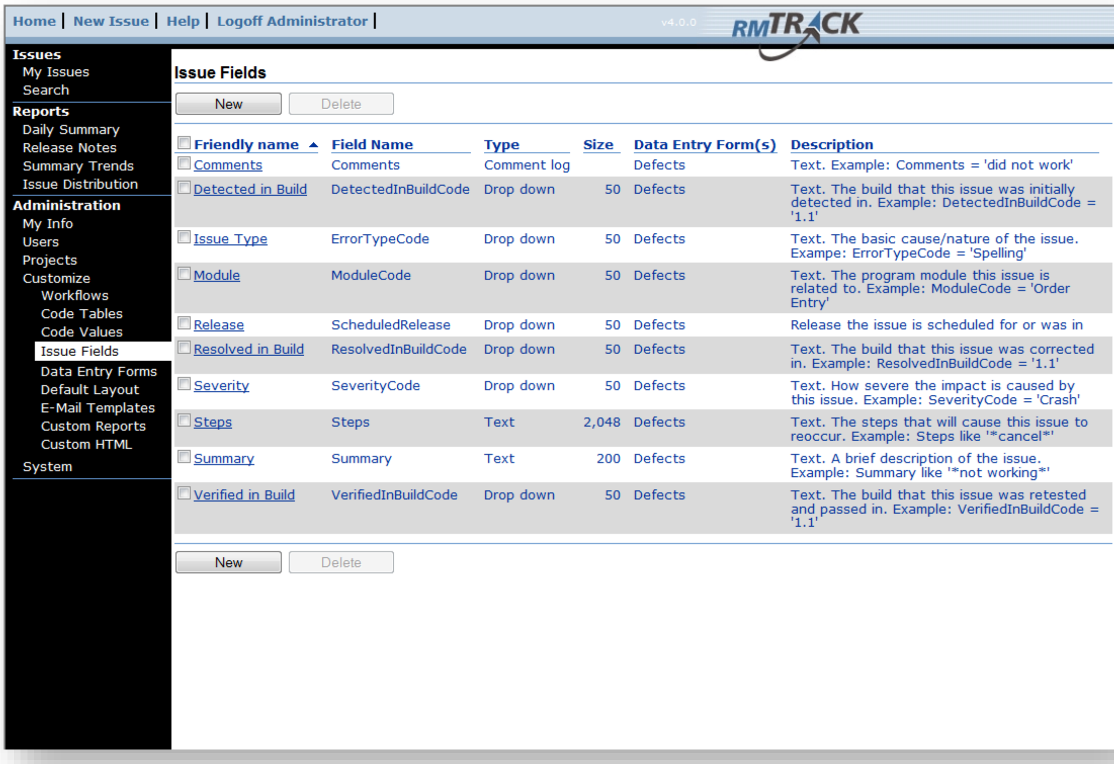
Every installation will have an entry under Code Table Values for Resolution Codes. The resolution codes behave differently than other code tables. The resolution code table cannot be deleted and you cannot add values to the Resolution Codes table from this page. You can delete unused Resolution Code values and you can update existing values which will also update them in the Workflow diagram. You can also set a sort order on your Resolution Code values here.

For more information on Resolution Codes, please see the section **Workflows** in this guide.

Issue Fields

The Issue Fields page lists the data fields that are associated with each issue.

To add a new Issue Field, click the **New** button. To delete an Issue Field, check the box to the left of the table name and click the **Delete** button. To modify an Issue Field, click on the Friendly name.



NOTE: If you are using an SQL server prior to SQL2005 the maximum size for an issue record is 7800 bytes. All issue fields combined cannot exceed this size.

The Issue Fields page shows:

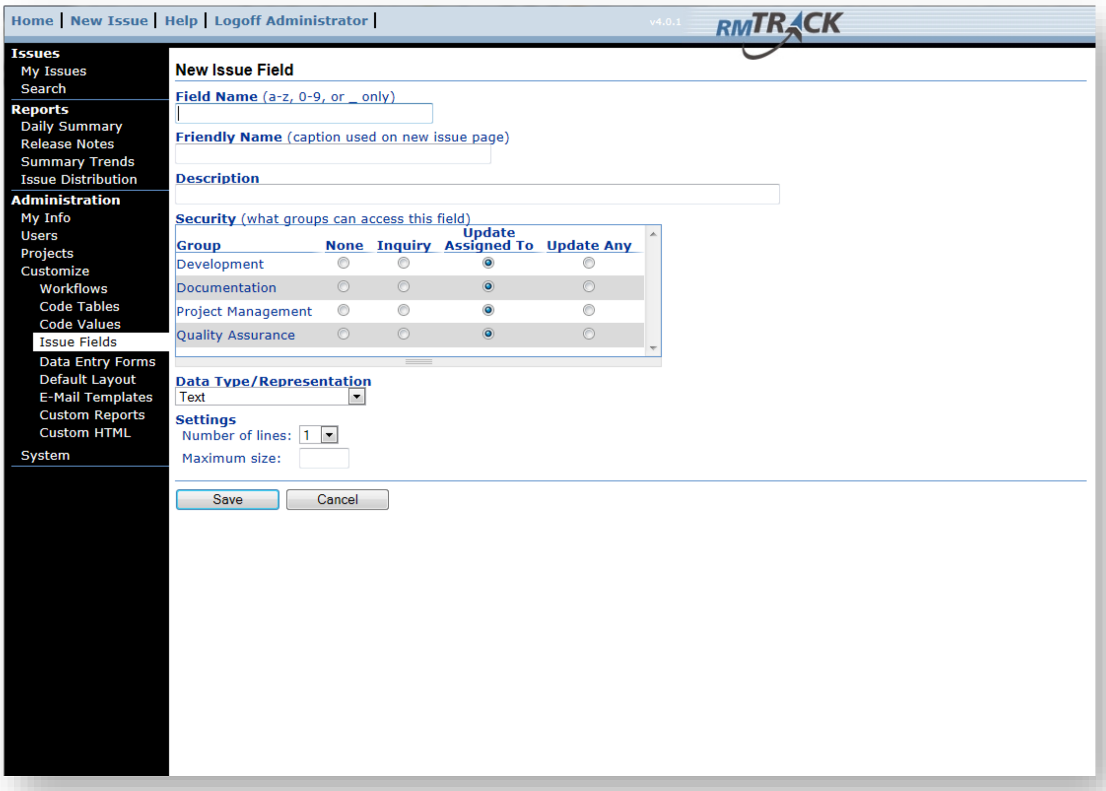
- Friendly name - the default label that will appear on the data entry form
- Field Name - the internal database field name
- Size (in bytes) - except Comment Log fields which are actually stored in a separate table and Computed fields which are calculated by SQL and not stored in the database
- Data Entry Form(s) - a list of forms use the field. Fields that are not used by any data entry form are noted above the list.
- Description – a description of the field which can be used as help on the data entry form.

Clicking on any of the column headers (except Forms) will sort the list by that column.

New Issue Field

Enter a Field name for the issue field. The field name is used internally by RMTrack to configure the database tables and can only contain alphabetic characters Aa-Zz, 0-9 and _ (underscore). You must also provide a Friendly Name for the issue field which is used as the default label for the field on the data entry form. Provide a short description of the field’s purpose or meaning. This description can also be used as help for the field if desired.

> **NOTE: Issue fields can also be added directly through the Data Entry Form designer. For more information please see the section Data Entry Forms in this guide.**



Field Level Security

Each new field will default to **Update Assigned to** for all groups. You can change the access to an issue field by clicking the appropriate radio button for each available group. For more information please refer to the section on **Field Level Security** under the **Groups** section of this guide.

Data Type/Representation

Select the **Data Type** for the field from the drop down list provided. Each Data Type requires different settings to be entered and selecting a Data Type will cause the page to alter accordingly.

NOTE: Creating issue fields dynamically modifies the internal RMTrack tables therefore once an issue field has been defined and saved, the data type and most settings for the field cannot be modified.

Text

Free-form text input. Users can enter any characters into these fields.

Number of lines is how many lines the display of this field will use on the data entry form. Typically a single entry line would be used to provide a short description or a name, whereas a multi-line field is used to provide more detail like a problem description or an address.

Maximum size is the number of allowable characters for the field.

Comments

These are free-form text fields in a **Log type** format. RMTrack will store and display each new addition to the field, stamped with the user id that entered it and date and time it was entered.

On the data entry form, Comment fields are presented in two parts: The existing comments already added to the issue and an input box for the user's new comment.

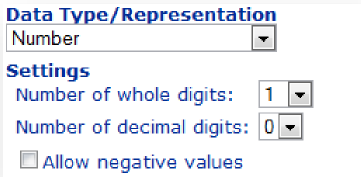
Entry area size is the number of lines provided for the user to enter their new comment.

Display area size is the space on the data entry form that will be used to display the existing comments. Choosing **Auto** from the drop down will cause all comments to be displayed.

By default, the existing comments are displayed in grey (Windows standard for inactive fields on an input form). This can be overridden by checking the **Display existing comments in black** check box.

Number

Allow numbers, integer or decimal, to be stored.



Number of whole digits is the number of digits to accept to the left of the decimal point.

Number of decimal digits is the number of digits accepted to the right of the decimal point. Zero indicates an integer field

You can also indicate whether or not to **Allow negative values** in the field.

Dropdown List

Provide the user with a list of possible values to choose from.

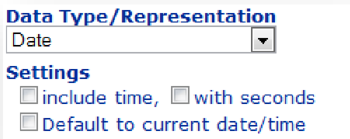
Custom Code Table is the previously defined a code table in which the list of values is stored.

Parent field name is used for dependent dropdowns, i.e. dropdown lists that are dependent a value selected in another dropdown. The parent field must have been previously defined and you must identify the parent field from the dropdown.

For more information please see the section **Code Tables** in this guide.

Date

Allows for dates and dates and times to be entered either manually or using a graphic calendar



Include time will allow a time (hh:mm) to be entered and stored.

With seconds will allow for hh:mm:ss.

You can choose to have date field **Default to the current date/time** if desired.

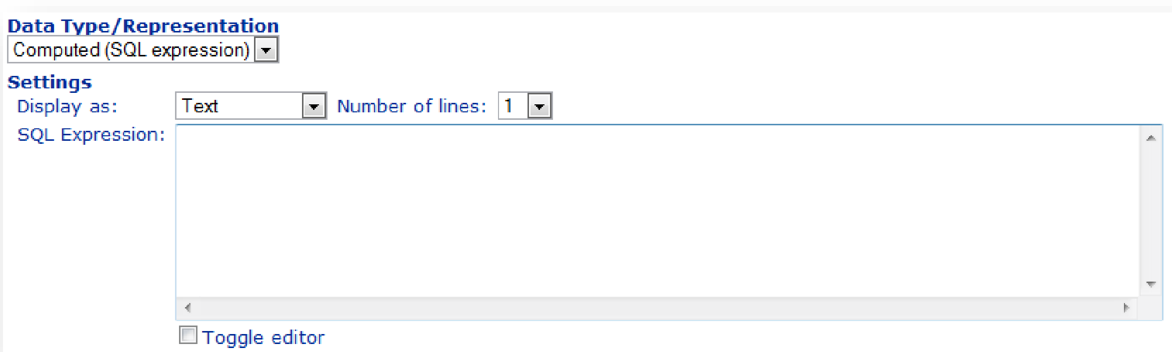
Yes/No entry field

These present check boxes to the user and hold a binary value of 1 or 0.

There are no additional settings for checkbox fields.

Computed (SQL Expression)

These fields are calculated by the database as a result of an SQL expression. A computed field is a virtual field that is not physically stored in the Issues table. For example, a computed field **Number Of Days Open** could be derived from an expression using the date opened field and the current date.



Display as is the format of the result of the expression

Some **Display as** choices will have a setting unique to that format e.g.:

- Text - Number of lines
- Numeric – Number of decimal digits

SQL Expression can be a non-computed field name, constant, function, variable, and any combination of these connected by one or more operators. The expression cannot be a sub-query.

During the save of a computed field, simple syntax errors will be detected i.e. referencing non-existent fields, functions and operators, and incorrect use of functions and operators. The more difficult to detect semantic errors and errors caused by a mismatch between the expression and the Display as setting (see below) will not occur until runtime. When errors are detected at runtime, the field value will display as ****error**** on both the issue list and the issue details pages.

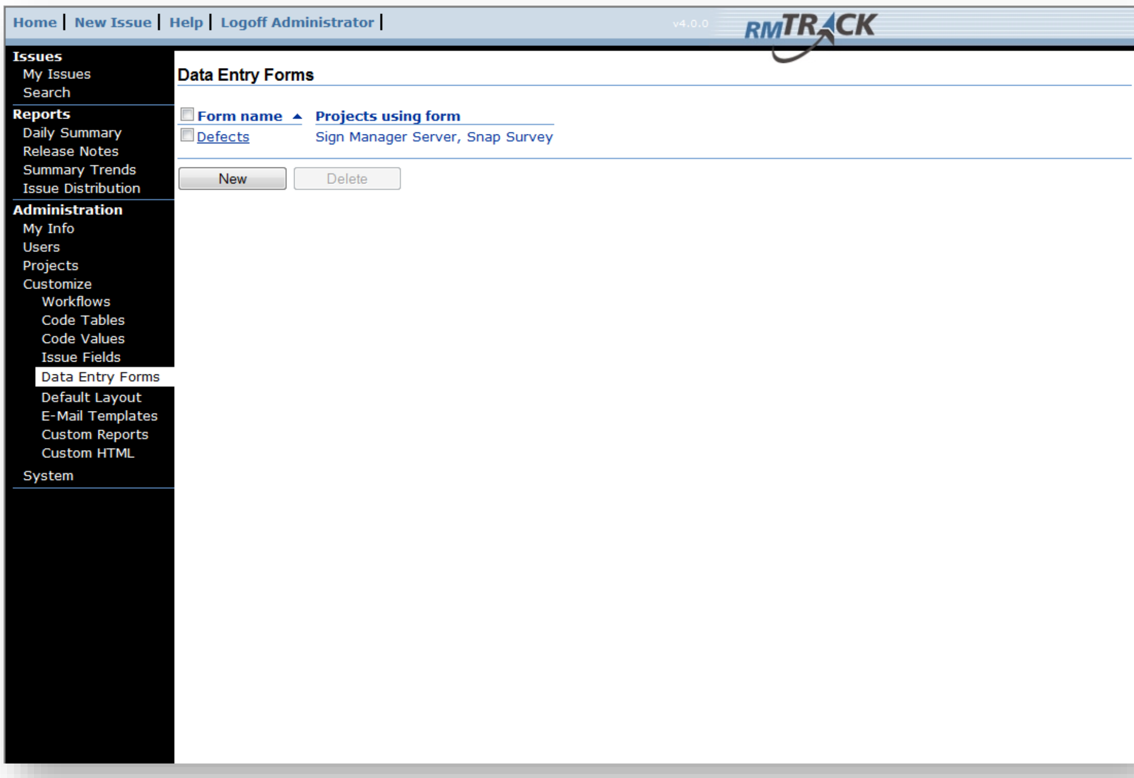
By definition, computed fields cannot be updated, they are calculated by the database engine. Therefore, **Field Level Security** can never be set to **Update** permission, only **Inquiry** or **None**.

> **NOTE: Computed fields require some knowledge of databases and SQL expressions. The RMTrack support team is available to assist you with the creation of any computed fields that you require.**

Data Entry Forms

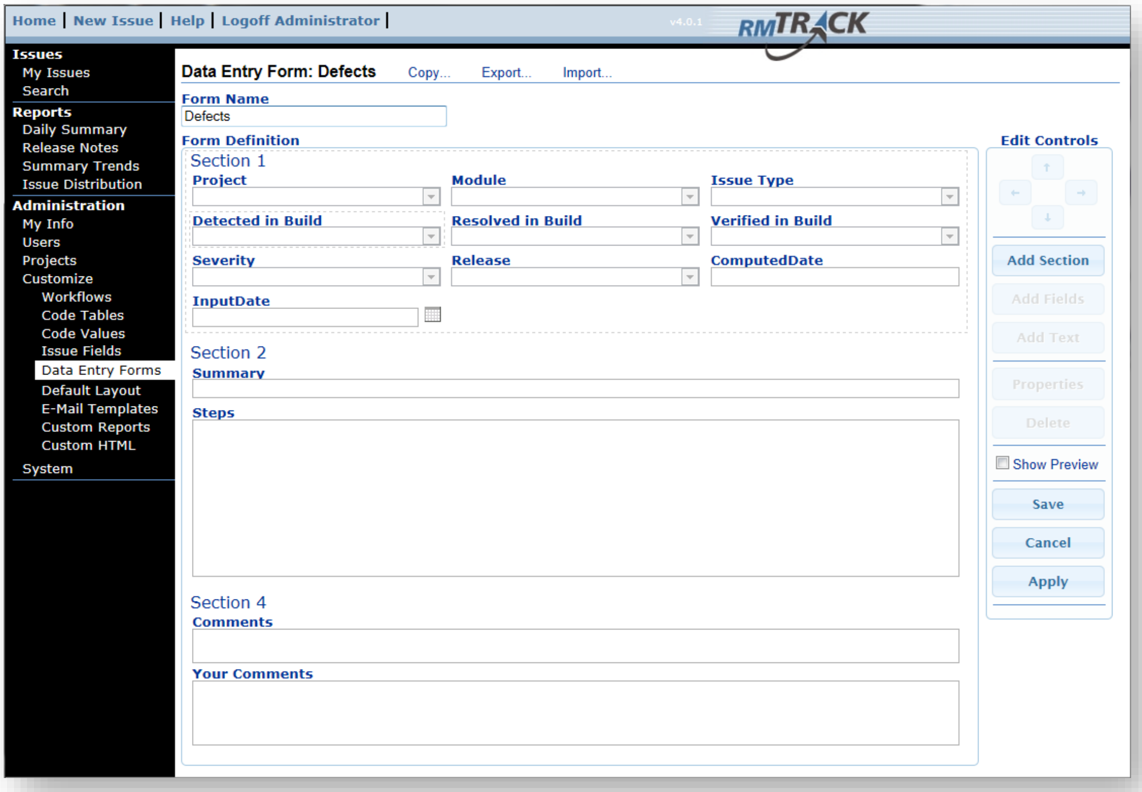
Data Entry Forms are used to define the positioning of the issue fields for viewing the issue details for both a new issue and for modifying existing issues.

RMTrack allows each project to have its own data entry form or one data entry form can be used by multiple projects. Projects that use each form are displayed on the Data Entry Form list.



To add a Data Entry From, click the **New** button. To delete a Data Entry From, check the box to the left of the Form name and click the **Delete** button. To modify a Form, click on the Form name.

Form Designer



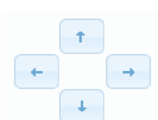
Each data entry form must be given a unique name. Clicking the **Copy…** link at the top of the page will copy the existing form to a new form. Forms can be **Exported** and **Imported** by clicking on the top of the Data Entry Form page.

Data Entry Forms are made up of **Sections** and each section contains one or more **Fields**. Clicking on a section will highlight that section and activate the **Edit Controls** for that section. Clicking on a **Field** will highlight that field and activate the Edit Controls for that field.

NOTE: Right-clicking on a section or a field will also offer the Edit Controls in a context menu.

Edit Controls

Positioning



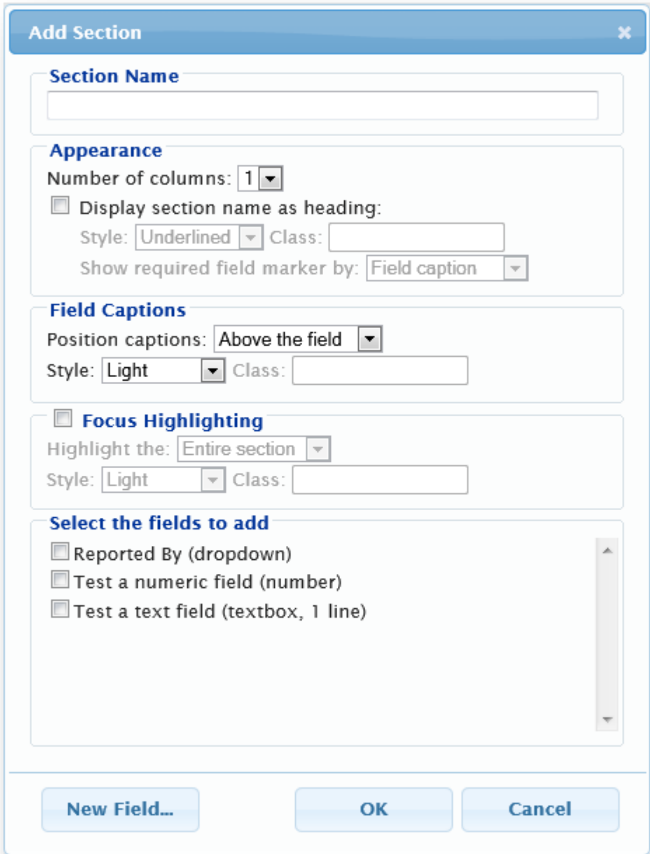
Sections and fields can be moved by using the arrows at the top right.

If the spot being moved to is occupied then the sections or fields will be swapped.

Sections and fields can also be moved by selecting a section or a field and **dragging and dropping** to the desired position using the mouse.

New Section

Clicking **New Section** will add another section to the current data entry form below the currently selected section. A properties dialogue will be opened:



Each section can have between 1 and 5 columns on the data entry form and each row of fields within the section must have the same number of columns.

Appearance

The **Section Name** can be displayed on the form as a heading or not.

If the name is displayed you can pick style for the heading of **Underlined** or **Highlighted**. It is also possible to set custom style (e.g. Color, Size, Font, Borders etc.) by choosing **CSS Class** from the Style dropdown and then providing the CSS class name. This class must then be added to your CustomStyles.css file in the Custom directory of your RMTrack installation folder. Please contact *support@rmtrack.com* if assistance with this option is needed.

Fields in RMTrack can be set as **Required** at different stages of the workflow. Required fields are indicated by a red asterisk (*) on the data entry form beside the field name. This indicator can be changed to be at the section level beside the Section Name. This is generally used when all fields in the section are required fields.

Field Captions

Names of fields can be displayed **Above, Below, to the Right,** or **to the Left** of the field. You can pick a style for the field name of **Light** (gray)**, Normal,** or **Bold**. It is also possible to set custom style (e.g. Color, Size, Font, Borders etc.) by choosing **CSS Class** from the Style dropdown and then providing the CSS class name. This class must then be added to your CustomStyles.css file in the Custom directory of your RMTrack installation folder. Please contact *support@rmtrack.com* if assistance with this option is needed.

Focus Highlighting

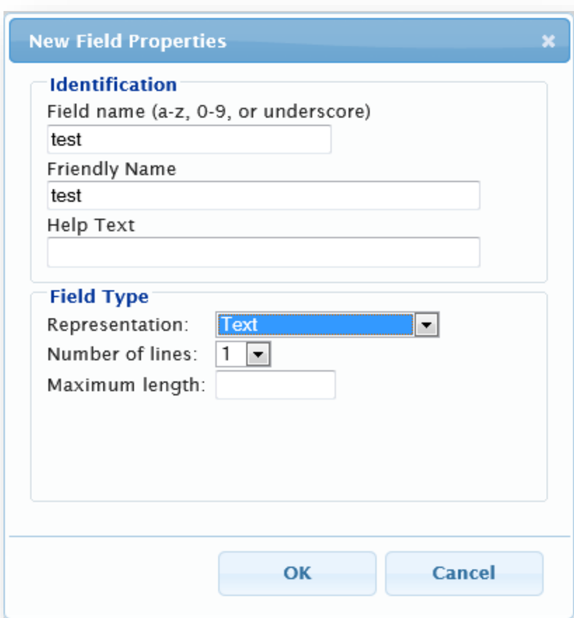
You can turn on focus highlighting which will highlight the area around the field or around the section that currently has focus on the page. The highlighting style can be **Light** (yellow) or **Medium** (blue). You can also set a custom color by selecting **CSS Class** from the Style dropdown and then providing the CSS class name. This class must then be added to your CustomStyles.css file in the Custom directory of your RMTrack installation folder. Please contact *support@rmtrack.com* if assistance with this option is needed.

Select the fields to add

You will be presented with a list of all fields that have been defined but are not currently used anywhere on the data entry form. Checking the box beside the field name will add the field to the form.

New Field…

You can also create new fields directly from the data entry form designer:



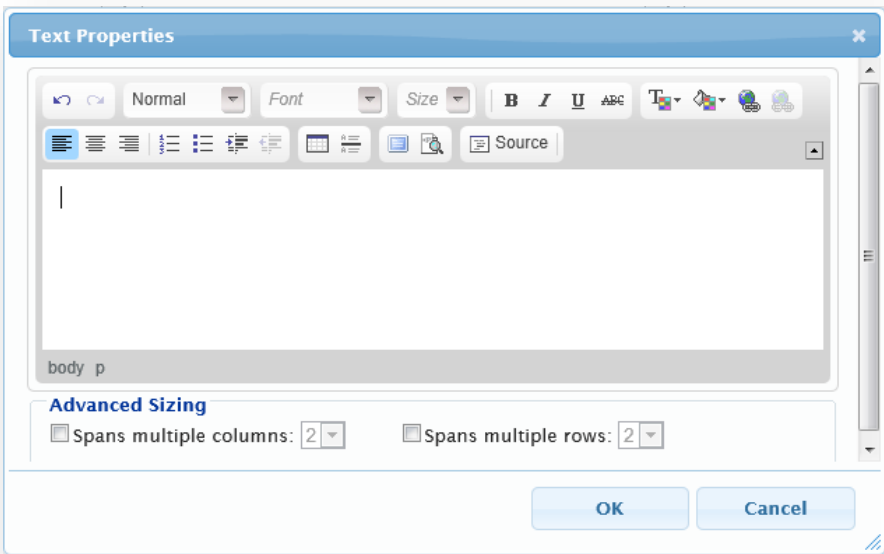
Selecting from the different field representations will switch the dialogue and allow the appropriate settings for each field type to be entered. For more information please see the section **New Issue Field** in this guide.

Add Fields

Clicking **Add Fields** will present the same list of unused fields as is shown in the New Section Dialogue above. You can also create a new field same as above.

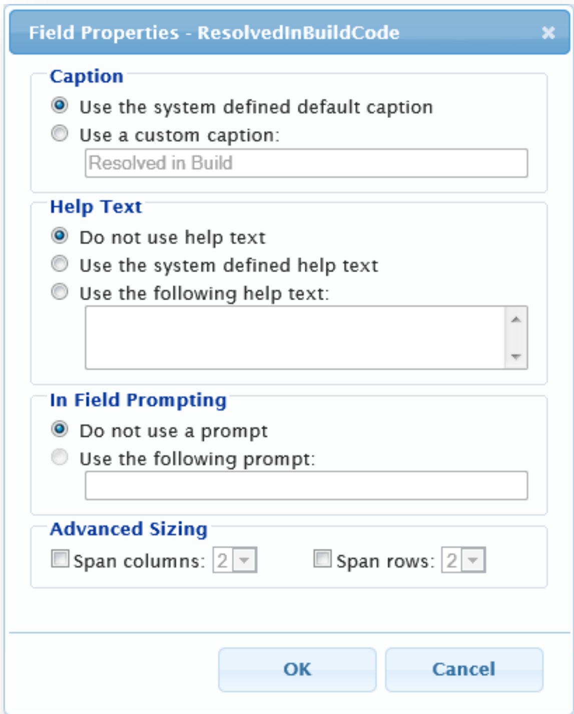
Add Text

Clicking **Add Text** allows formatted text to be included in a field position in the data entry form. Text can be added by using a HTML editor window:



Properties

Clicking on **Properties** will bring up the dialogue for the selected item (Section, Field, or Text). The Section and Text dialogues are the same as appear for Add Section and Add Text. For Fields the dialogue is:



Caption

For the **Field Caption** you can choose to use the default caption (also known as Friendly Name) that is associated with the field or you can create custom caption to be used on the form. This allows for the same field to be used on different forms for a different use.

Help Text

Each field on the data entry form can optionally have help text associated with it. If help text is used, a question mark (?) will appear beside the field caption and hovering over the field name with the mouse pointer will display the help text. The help text can be the system default as defined in the description of the field on the Issue Fields page or custom help text can be used for each form.

In Field Prompting

Text, comment and date (and time) fields allow for an In Field Prompt to be added. This is text that will appear in the field prior data being entered by a user.

Advanced Sizing

On both the Field Properties and the Text Entry dialogue are places to enter **Span Columns** and **Span Rows**. This allows some field types and text entries to span more than a single column or a single row. For some field type this will have no effect, for example a check box cannot span rows or columns and a drop down can span columns but not rows. Also, fields in the last row cannot be set to span rows and fields in the rightmost column cannot span columns and there must be space (i.e. no other fields) beside or below the field being spanned. Some trial and error may be necessary to attain the desired effect.

Delete

This will delete the selected item on the form e.g. Section, Field, Text entry.

Show Preview

Checking the Show Preview check box will take the form out of edit mode and give a rough approximation of what the form will look like. However, some attributes will not be shown, for example span rows and span columns do not show in Preview. To truly see what a form will look like it should be viewed on the Issue Details page.

Apply

This will save the changes to the form without leaving the page. This is especially useful when designing a form.

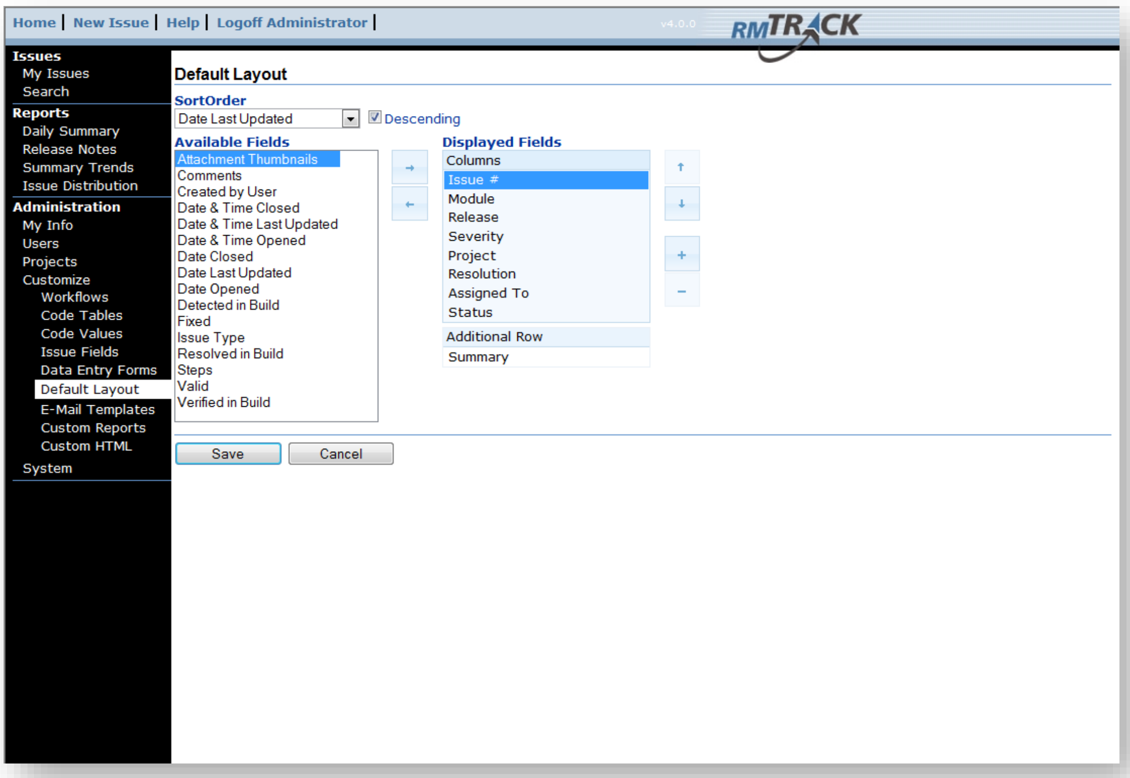
> **HINT: It is best to create a test project and assign it the form being designed or modified. Open two browsers (or two tabs), one on the forms designer, and one creating a new issue in the test project. Make a change to the form and click Apply then switch to the other browser and click refresh to see your changes.**

> **HINT: Care should be taken when designing data entry forms if you use field level security to deny access to issue fields for certain groups. When these users create a new issue or view an existing issue, there will be blank spaces on the form where the fields they do not have access to are located. In these cases it may make sense to group restricted access fields together, perhaps at the bottom or side of the form.**

> **HINT: Form design can be tricky! RMTrack support has lots experience designing forms and we are happy to assist. Just contact *support@rmtrack.com*.**

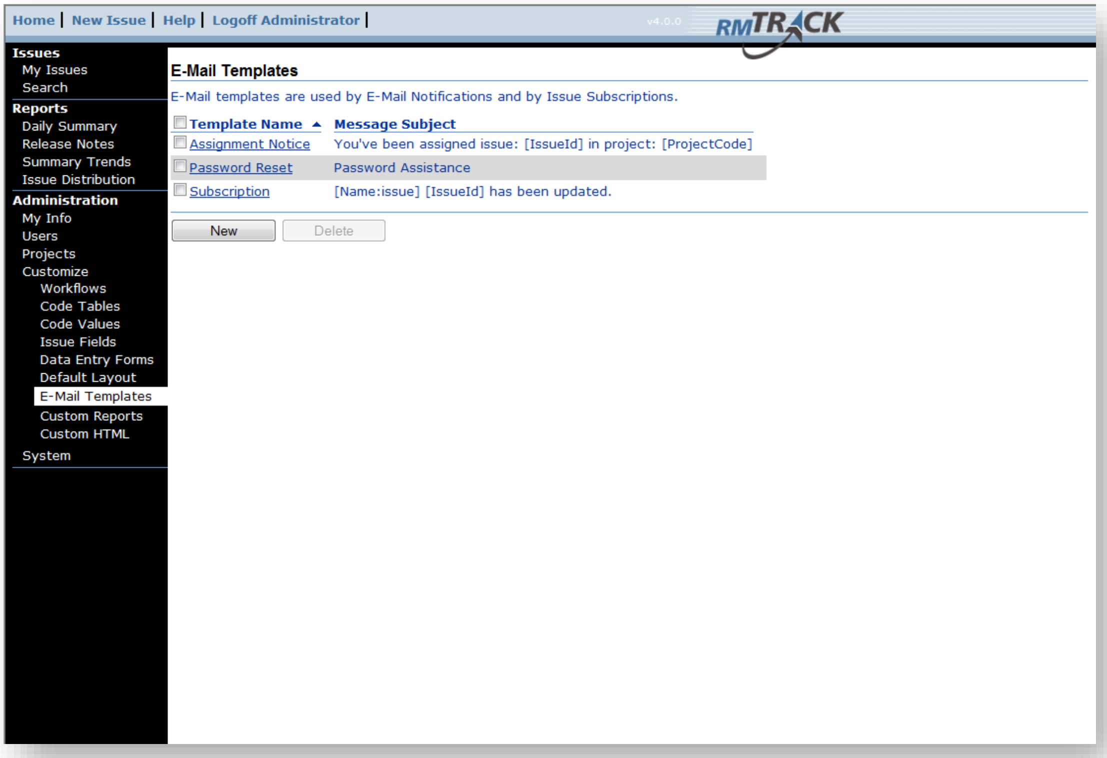
Default Layout

Each RMTrack installation is required to have one default layout. This is the layout that controls the display of a list of issues when a user selects the “Default” layout. Only users with site administrator privileges can update the default layout. The default layout is maintained in the same manner as individual layouts with the exception of publishing settings - all users automatically have access to the site default layout. For more information on maintaining layouts please refer to the section on **Layouts** in the **User Guide**.



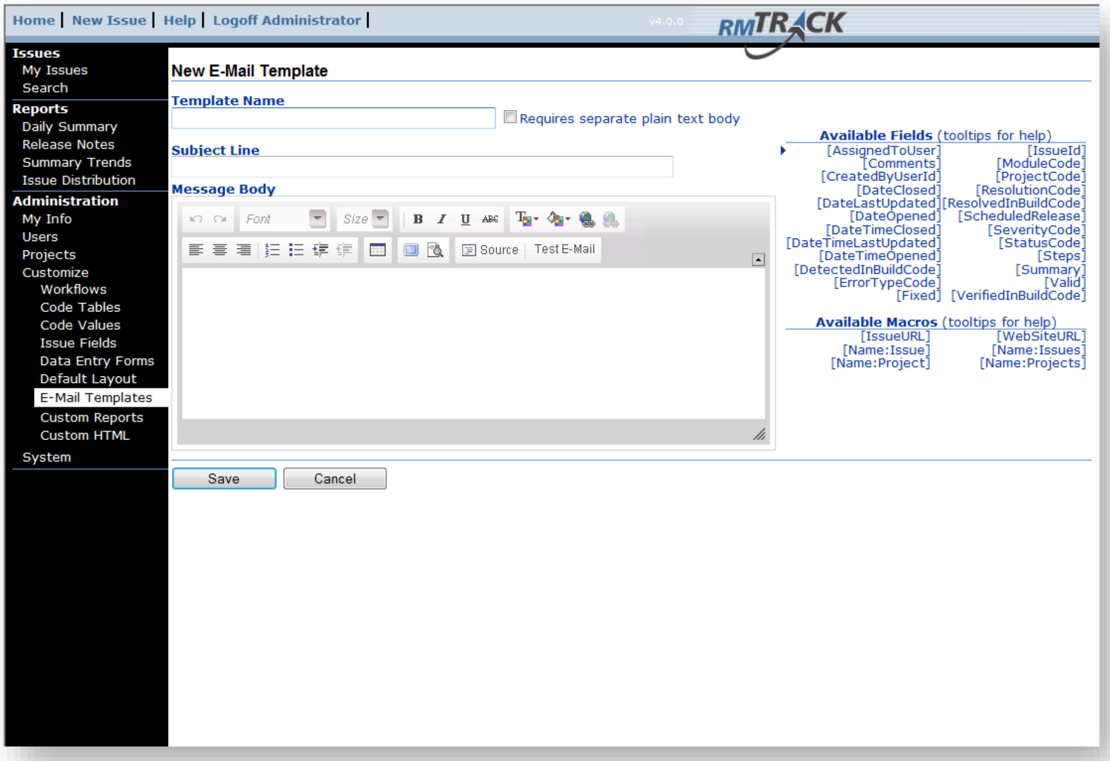
E-Mail Templates

E-Mail templates define the layout and format of automatic e-mail notifications sent by RMTrack. Each **E-Mail Notification Rule** must be associated with an e-mail template. If **Subscriptions** are enabled they must also specify the template to use. If **Password Resets** are enabled, a template must be specified.



To add an E-Mail Template, click the **New** button. To delete a Template, check the box to the left of the Template name and click the **Delete** button. To modify a Template, click on the Template name.

E-Mail Template Details



Each e-mail template must be given a name and must contain a Subject Line.

Issue fields can be embedded into both the subject line and the message body of an e-mail. A list of available fields is displayed on the right side of the template page. Issue fields must be enclosed in square brackets e.g. [field].

NOTE: The Comments issue field will only use the last comment added to the issue.

Several macros are also available for inclusion in the e-mail:

Macro	Use
[IssueURL]	URL of the specific issue that triggered the e-mail notification
[WebSiteURL]	URL of the RMTrack web site
[PasswordResetUrl]	URL to be used for a password reset e-mail
[Name:Issue]	Name for Issue as set in Site Options - Singular
[Name:Issues]	Name for Issue as set in Site Options - Plural
[Name:Project]	Name for Project as set in Site Options - Singular
[Name:Project]	Name for Project as set in Site Options - Plural

NOTE: For the 'name' macros using lower case vs. upper case in the macro name (e.g. Name:issue vs. Name:Issue) will cause the same case to be used in the e-mail (e.g. issues vs. Issues)

Care must be taken when designing e-mail templates. Certain users may not have view access to certain fields (see **Field Level Security**). E-Mail notifications do not take field level security into account and will send the field information to any designated recipient.

HTML E-Mail Body

The main message body section of the page is a full HTML editor and includes standard editor features including; font type, font size, bold, underline bullets, numbered lists, tables (useful for aligning fields), etc. Simply create your e-mail body as you want it to appear in the e-mail notification.

Clicking on the **Source** button of the editor will switch the editor display allowing you to edit the raw HTML if you choose.

The **Test** button allows you to send a test e-mail so that you can view the actual result of the template. When doing a test you will be asked for an e-mail address and issue # for the test.

Text E-Mail Body

Normally, RMTrack does a brute force HTML to Plain text conversion to ensure each e-mail includes both plain text and html. However, the html to plain text conversion does not always produce nicely formatted results.

For those cases where clients wish to explicitly define a plain text e-mail body, there is a checkbox beside the Template Name field that will open a secondary plain text editor where an explicit plain text e-mail body can be defined.

Custom Reports

RMTrack allows clients to create and publish their own reports by writing SQL queries. Using this feature requires both knowledge of SQL and knowledge of the RMTrack database structure.

> **NOTE: RMTrack Support is happy to assist with the design and creation of reports. Contact *support@rmtrack.com* for assistance.**

Custom Reporting Guide

Custom reporting is a complex feature addition to RMTrack. Therefore we have created a separate guide for this feature. You can download the Custom Reporting Guide from the RMTrack website downloads page or find it from **Help→Contents→Documents** on any page of the RMTrack application.

Activating the Custom Reporting Feature

Custom Reports allows clients to create SQL scripts within the application that will call the SQL Server to generate the report. It is possible to write *reports* that can actually *update* the database (or in a less secure environment – theoretically update any database on the server).

> **WARNING: We highly recommend that you involve your database/network professionals when activating the Custom Reports feature.**

RMTrack uses a database connection file called DBConnection.udl to tell the application how to access the RMTrack database. This file is stored in your RMTrack virtual directory (default location is: C:\Inetpub\wwwroot\RMT).

To activate Custom Reports a new and separate database connection file is required. This new file must be called **DbConnectionReporting.udl** and must reside in the sub-folder called **ReportingConnections**.

> **WARNING: It is strongly recommended that this connection file specifies a database user that ONLY has access to the RMTrack database and ONLY has reporting capability. This will eliminate the possibility of any databases on the server being updated via the custom reporting feature.**

Each individual report can also have its own database connection file, allowing different levels of access for each report. You can create separate database connection files that have the same name as the report e.g. MYREPORT.UDL. When the application attempts to run a report, it will first check to see if the report has its own unique database connection file. If the report has its own database connection file then it will be used to connect to the database. If a report does not have its own database connection file the report will use the default DbConnectionReporting.udl.

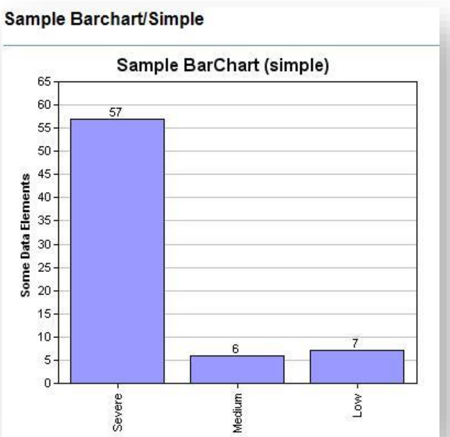
Examples of RMTrack Custom Reporting:

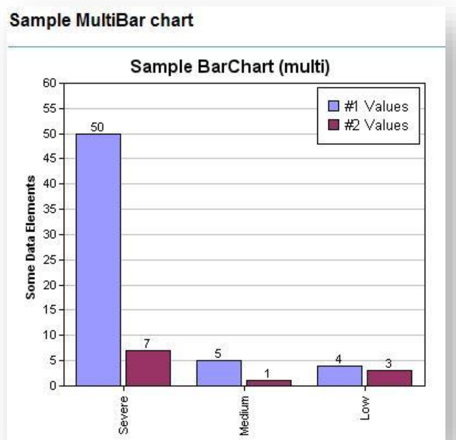
RMTrack Custom reporting allows for the creation of simple column/row type reports. For example:

Example: Report Style Layout

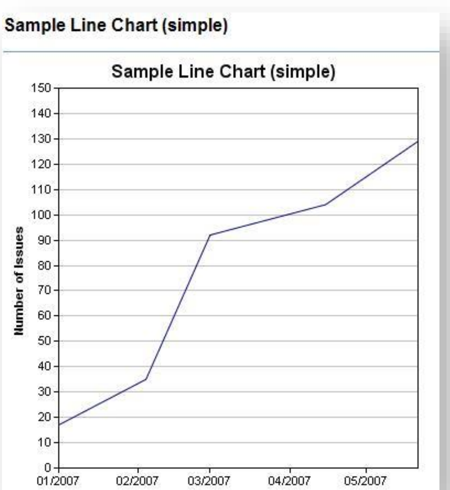
Issue #	Module Code	Summary
17	m31-14	Something went wrong
29	m41-88	Additional problems
45	m10-01	Incorrect results

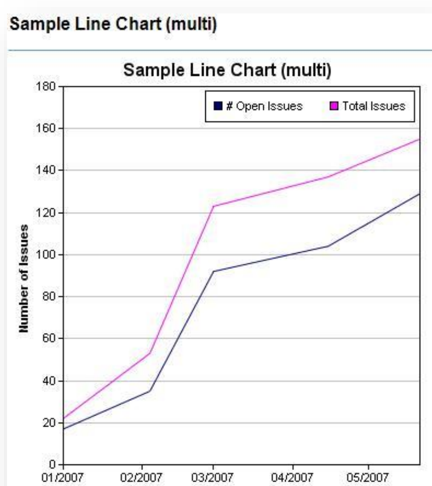
You can also create bar charts:



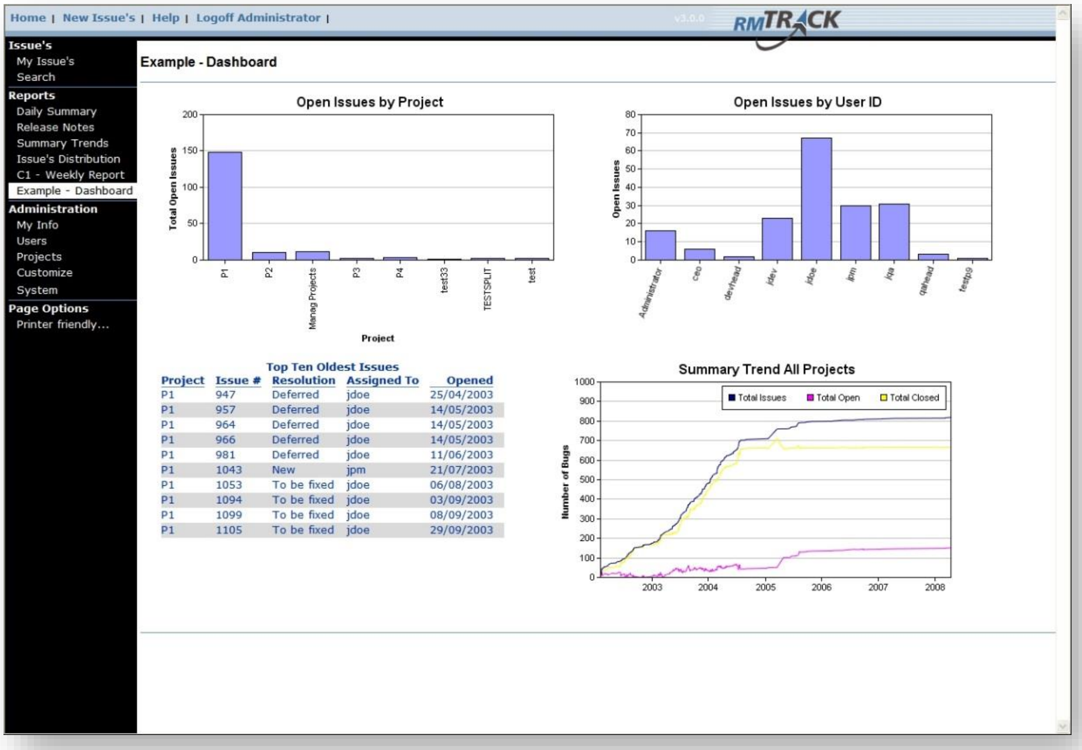


…and line graphs:





You can also combine reports to achieve a dashboard effect:



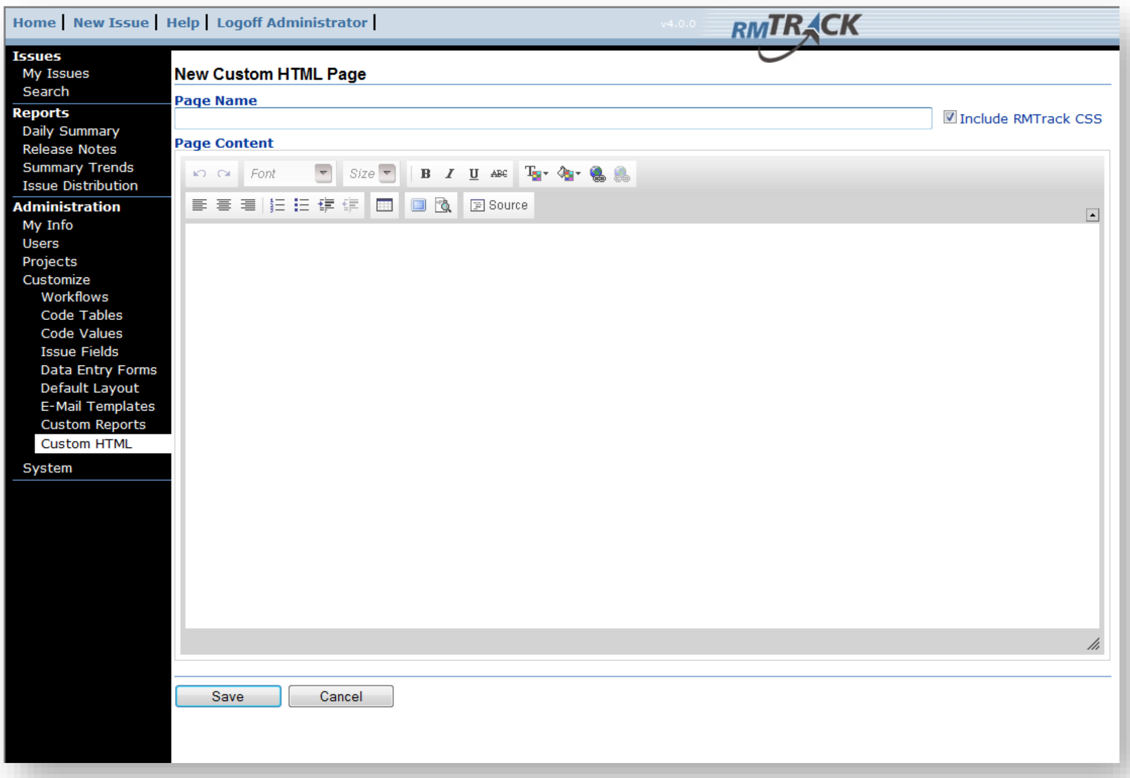
Custom HTML

Custom HTML pages can be created and maintained within the RMTrack database. These pages can then be published to the left side menu allowing users access to these pages. The primary use for these pages is to allow clients to add their own documentation and guides to the RMTrack system.

To add a Custom HTML page, click the **New** button. To delete a page, check the box to the left of the page name and click the **Delete** button. To modify a page, click on the page name.

> **NOTE: Site administrators can also edit the page directly from the page itself. Once published to the menu system, when Site Administrators access the page through the menu system, and Edit… link will appear beside the page name.**

Custom HTML Page Editor



Each page must be given a name and this name will appear as the page title when the page is published. You have the option to **Include RMTrack CSS** when the page is viewed. This will cause the page to look like the standard RMTrack pages with respect to color and font etc. but may override the formatting choices made when creating the page.

The **Page Content** can be entered using the HTML editor supplied or you can enter source HTML by clicking the **Source** button in the editor.

The HTML editor accepts anything, but when the HTML is displayed it is sanitized and unsafe HTML is dropped.

Once created, these pages can be published and added to the RMTrack left side menu by using the **Menu Entries** feature under Administration > System. The menu entry URL should be:

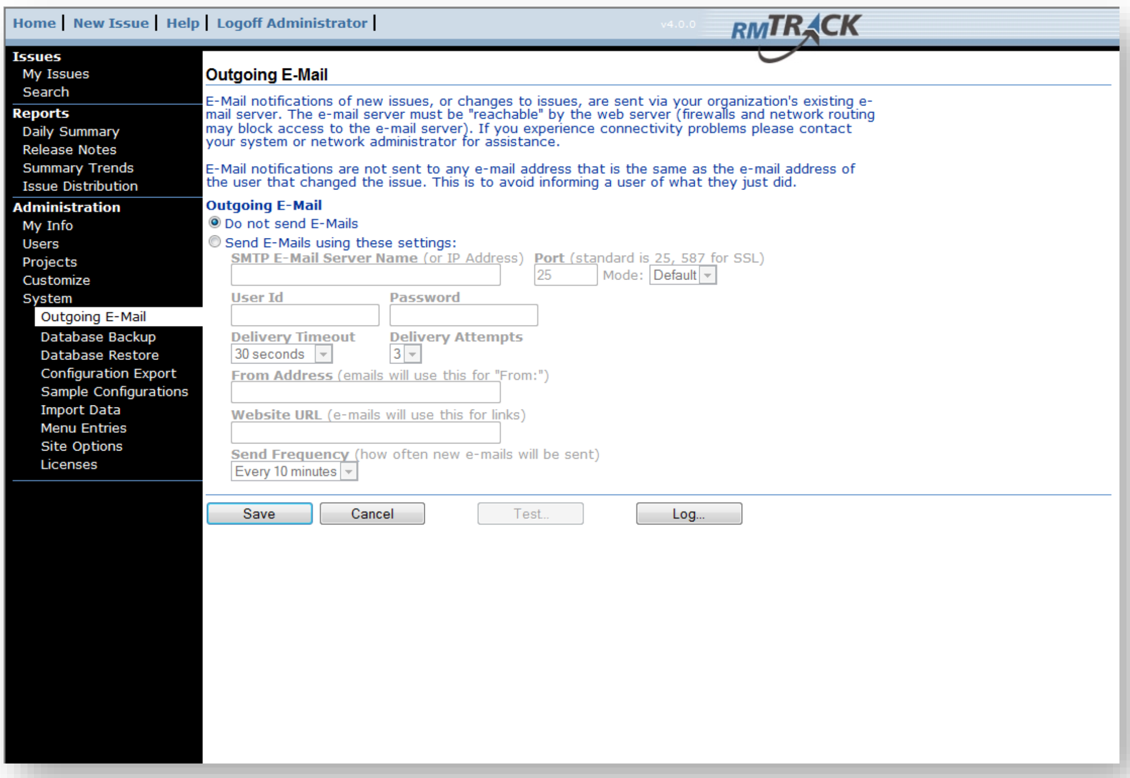
/NonAdmin/Reports/CustomHtmlPage.aspx?PageName=XXXX

System Menu

Outgoing E-Mail

NOTE: Clients of the RMTrack Hosted Service will be pre-configured to use the RMTrack mail server.

You can configure RMTrack to send e-mail notifications based on activity in RMTrack. If you do not wish to use e-mail notifications, select the **Do not send E-Mails** option.



E-Mail notifications of new issues, or changes to issues, are sent via your organization's existing e-mail server. The e-mail server must be reachable by the web server (anti-virus programs, firewalls and network routing may block access to the e-mail server). If you experience connectivity problems please contact your system or network administrator for assistance.

To use e-mail notification you must provide your SMTP e-mail server name (or IP address) the port number and the connection mode. This information can be provided by your system or network administrator. If your e-mail server requires authentication, you must provide a User ID and password. Do not fill in these fields unless your e-mail server requires them. Again, consult your system or network administrator. Set your delivery timeout and number of delivery attempts.

The **From Address** field can be any address you choose. You can attach a name to the address by putting the Name followed by the e-mail address enclosed in angle brackets i.e. “Project Manager <jdoe@somecompany.com>”. Different e-mail servers have different requirements for the “from” address in e-mails. Some servers may require that this be an actual e-mail address. Remember that this address will receive and delivery failure notices from your mail server and also any e-mails from replies to the RMTrack e-mail notifications.

The **Website URL** field is used to insert a link to your RMTrack web site, and to specific issues, directly into your e-mail notifications. For more information on inserting links into e-mails, please refer to the section on **E-Mail Templates** in this guide.

RMTrack stores e-mails to be sent and sends all pending e-mails at the same time. You may select the frequency that this job is executed from the dropdown list under **Send Frequency**.

When your settings are complete and saved you can use the **Test…** button to send a test e-mail to verify that the connection between your web server and your e-mail server is valid.

The **Log…** button will display a log of outgoing e-mails. This log shows sent and failed e-mails as well as pending e-mails. Log entries can be cleared by clicking the **Clear Log** button found on the Outgoing E-Mail Log page.

By Default RMTrack deletes e-mail notifications from the log after 3 days for successfully sent e-mails and 30 days for failed e-mails.

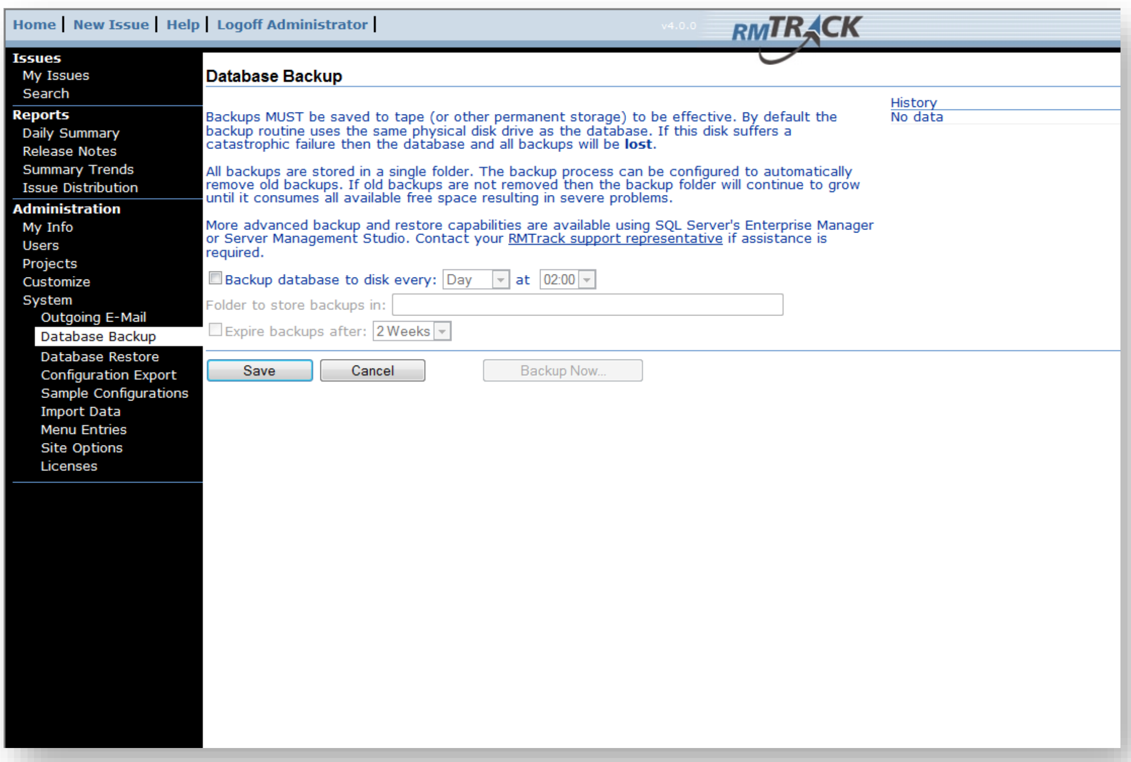
> **NOTE: It is possible to change the retention period for the e-mail log. For assistance with this please contact *support@rmtrack.com*.**

Database Backup

NOTE: Clients of the RMTrack Hosted Service cannot change their Automatic Backup settings. However, hosted clients can use the 'Backup Now' feature. To change your backup settings, please contact support@rmtrack.com

RMTrack has a completely integrated Backup and Restore process to help ensure that important information is not lost. It should be noted that for any backup process to be truly effective, backups should be stored on a permanent storage device, and not on the same physical drive as the database.

To enable the backup process check the Backup database box and then select the backup frequency and the time of execution. In the next field, define the location where the backups will be stored. Finally, to ensure that the backup process does not run out of storage space, you are able to configure the backups to be automatically deleted after a given period of time. Save your settings by clicking the **Save** button.



RMTrack also offers the option of manual backups by clicking the **Backup Now** button. This allows the administrator to periodically create backups. This may be useful if large changes are about to made to the application configuration or maintenance is to be carried out on the database server.

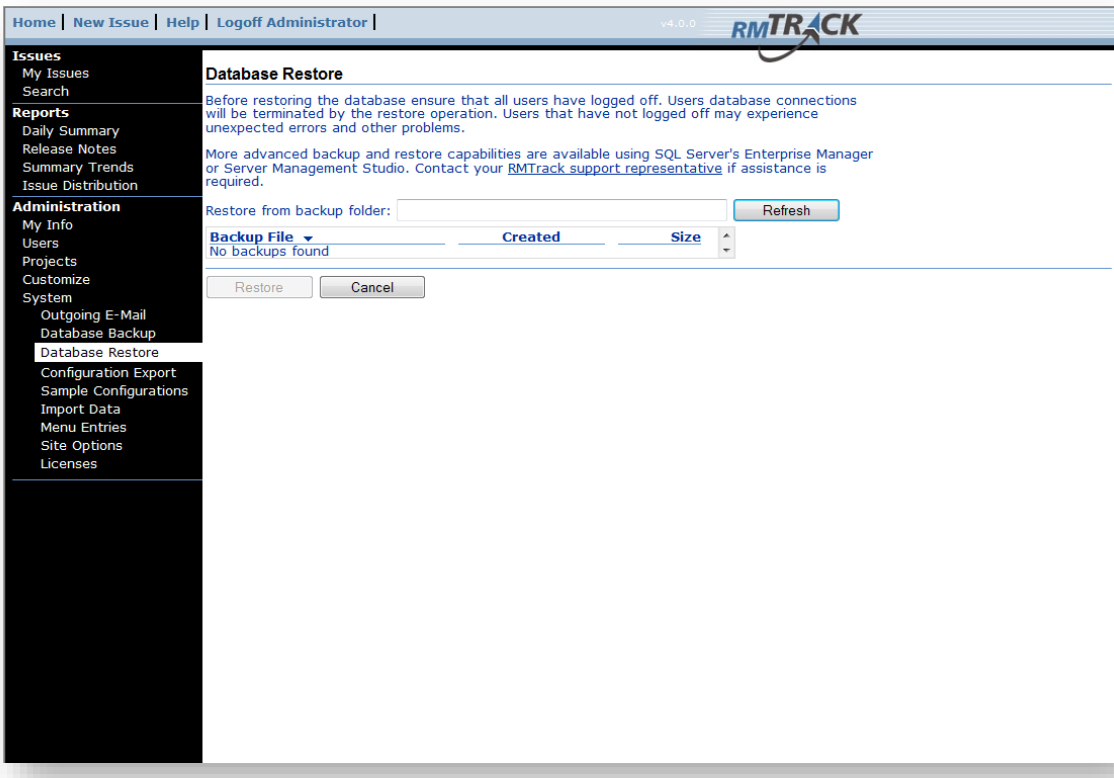
When backups are performed, two separate files are created; a database backup and a log file. An example of a filename for the database backup would be: **RMT_db_201108071228.BAK,** where RMT is the name of the SQL database. The number represents the date and time of the backup: August 7, 2011 at 12:28. The associated log file for this backup will be named: **BackupLog_201108071228.txt**. Note that the date and time are the same as the database backup file. Due to the naming convention used, do not attempt to backup twice within the same minute.

RMTrack displays a history of the backups on the right side of the backup page. Each history entry shows the date and time of the backup and whether it **Succeeded** or **Failed**. Under each history entry is a link to the backup log for that backup. Clicking on this link will display the log.

Database Restore

When restoring the database you should ensure that all users have logged off. This can be verified from the **Licenses** page. The restore process will terminate all users' database connections and could lead to unexpected errors.

Select the location of the folder where the backups are stored. If you change the location of the backup folder, click the **Refresh** button to see a new list of available backups. Select the backup you wish to restore by checking the appropriate box and click the **Restore** button. This will cause a new window to be displayed asking **Are you certain….** Due to the nature of the process being requested i.e. it cannot be undone, when you click OK, a second popup box will ask you to confirm your decision.

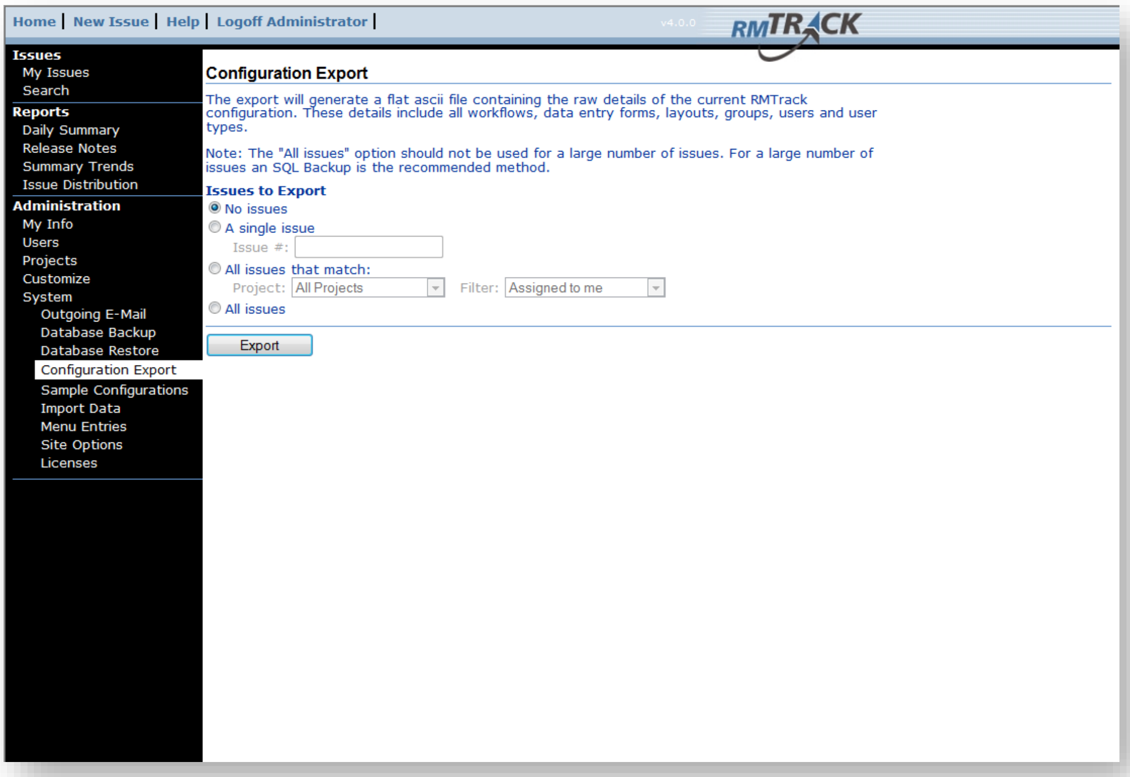


When you click OK to the confirmation, the restore process will begin. When the restore is completed you will see a message:

> Restore in process...
>
> 100 percent processed.
> Processed 504 pages for database 'RMT', file 'RMT' on file 1.
> Processed 1 pages for database 'RMT', file 'RMT_log' on file 1.
> RESTORE DATABASE successfully processed 505 pages in 0.857 seconds (4.827 MB/sec).

Configuration Export

This feature allows for the export of the configuration information of your RMTrack database. This is generally used to copy a configuration from one installation to another, for example to create a test instance of RMTrack. It may also be used to assist RMTrack with problem solving support issues.



You can optionally include some or all issues to be exported with the configuration data. However, exporting the configuration with all issues is best done by taking a backup of your database and restoring it.

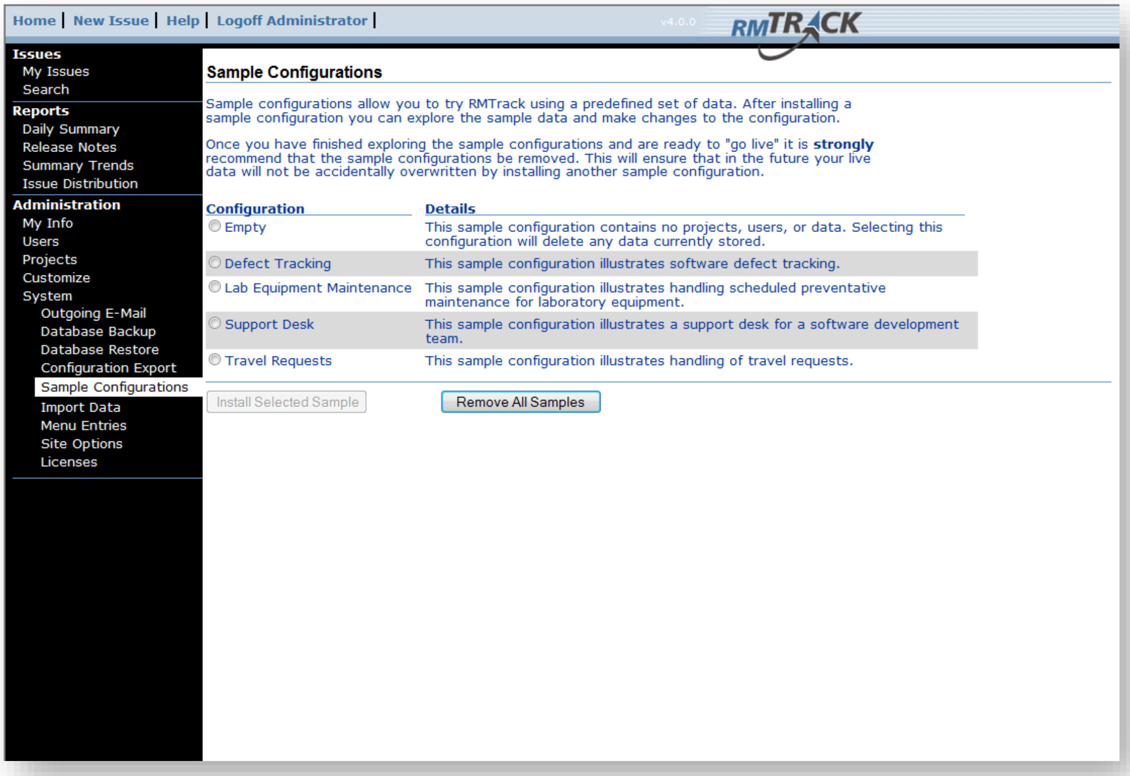
For security and safety reasons all user passwords will be cleared in the exported database. Also the export process will disable some features:

- Outgoing e-mail (notifications) will be disabled
- Any/All incoming e-mail setups will be disabled
- Scheduled Backups will be disabled

To use the exported database file you must first create a default RMTrack database. Then run the SQL script created by the export database routine against the default database using SQL Query analyzer. For assistance with this feature please contact support@rmtrack.com.

Sample Configurations

If you have not had experience with RMTrack before, we suggest using the sample configurations page to investigate some RMTrack setups.



Here you will be able to load various sample RMTrack setups like: **Defect Tracking** and **Support Desk**. Selecting a sample and clicking the **Install Selected Sample** button will load Groups, Users, Projects, Workflow, Fields and Data Entry Form, plus a few sample issues. You can then play with the application and make configuration changes. At any time, you can select another sample to try or you can go back to the **Empty** configuration.

Once you have finished exploring RMTrack and created your configuration, you may want to consider using the **Remove All Samples** button so that your configuration cannot ever be accidently overwritten by installing a sample.

Import Data

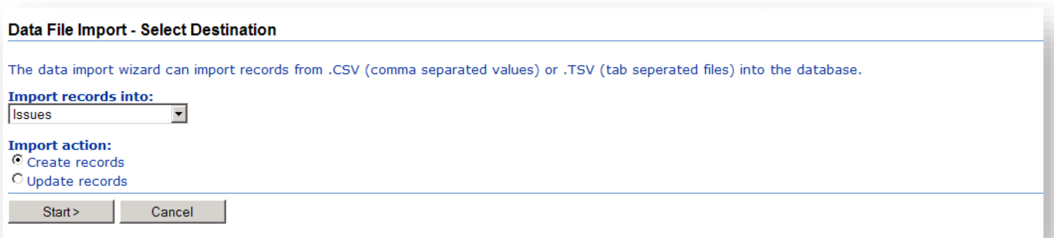
RMTrack provides a **Data Import Wizard** that can be used to import data into the **Issues, Users** and **Code** tables. The input file must be in either a .CSV (comma separated values) or .TSV (tab separated values) format.

The importer can be used to create records or to update existing records.

The wizard walks you through a series of screens to import data:

> **NOTE: The actual screens of the data importer vary depending on some selections made. The screens below represent creating new issues with the importer.**

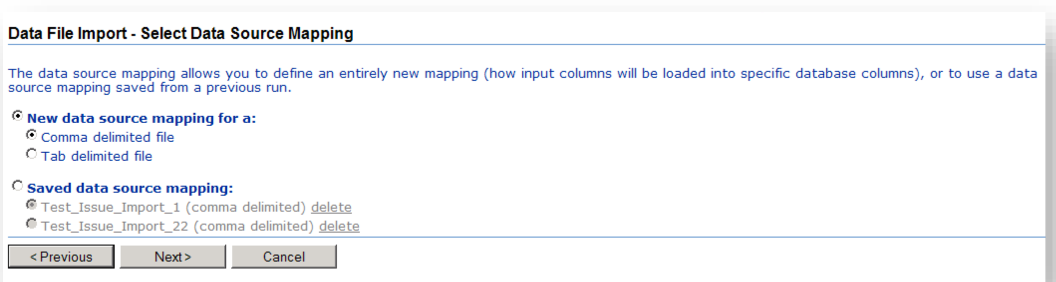
Select Destination



Select the table to import the data into form the dropdown. The list will contain the *Main Tables*: Issues and Users and a list of all *Code Tables* defined in your system.

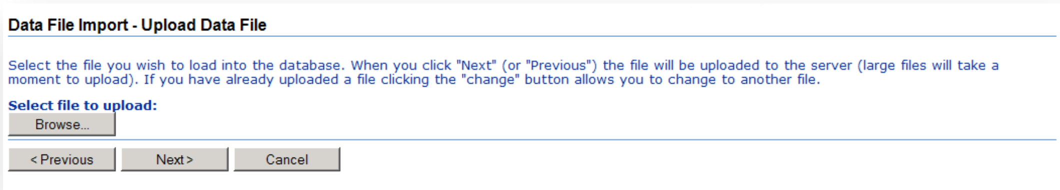
Select **Create** records or **Update** records.

Select Data Source Mapping



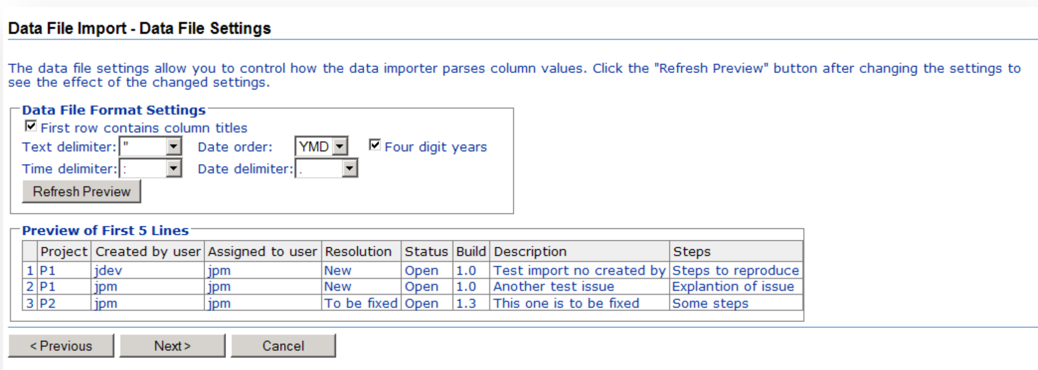
Select the type of input file (.CSV or .TSV) or if you have previously created and saved mapping details for this type of import, you can select the mapping from the list.

Upload Data File



Use the **Browse…** button to navigate to your import data file.

Data File Settings



Under **Format Settings** indicate whether this data file contains headings on the first row of the file.

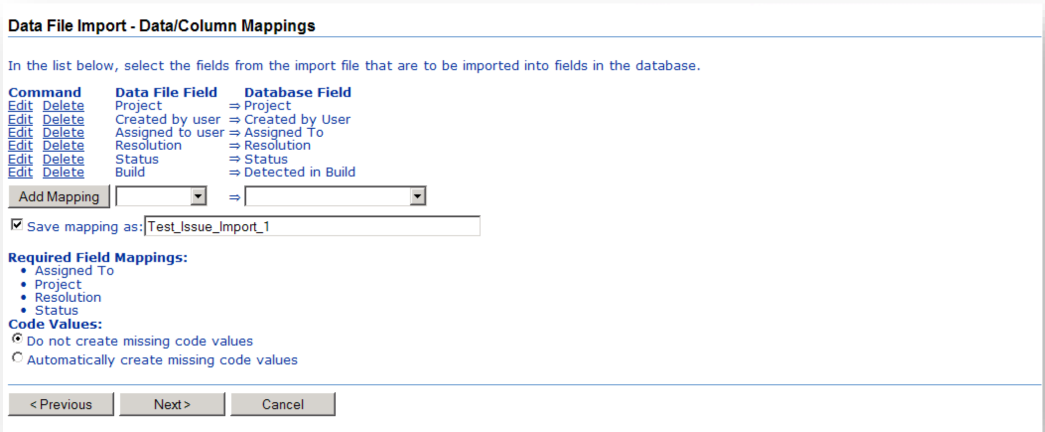
> **NOTE: While not required, it is STRONGLY recommended that you create import files with the RMTrack field names as the column headings. This will make the mapping much easier to accomplish.**

Some column values must be ‘quoted’ as they may contain comma (or tabs) which would be considered a field break. You must indicate the character used to ‘quote’ your text fields. A .CSV file created with MS Excel will use “ as the text delimiter.

If date and time fields are included, you must identify the time and date portion delimiters and a date order must be provided e.g. DMY, MDY etc.

This page will show the first five rows of your selected data file so that the data and field separation can be verified.

Data/Column Mappings



Each column of you data file must be **mapped** to the appropriate field in RMTrack. The **Command** column allows you to **Edit** or **Delete** a data file field to field mapping.

The **Data File Field** column and drop down is a list of all the fields in your data import file and the **Database Field** column and associated dropdown is a list of the RMTrack fields.

Select a field from your data file and **map** it to a field in RMTrack then click the **Add Mapping** button. Each time a data file field and RMTrack field are added to the mapping those columns and fields will be removed from the lists.

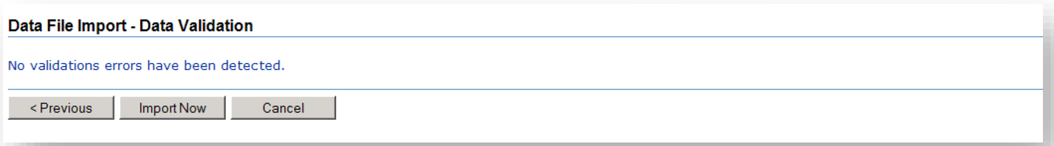
You can save the mapping details for reuse by checking the box and providing a mapping name. Make sure to make this name meaningful as you may end up with several different mappings for different uses.

You will see a list of **Required Fields Mappings**. This is the minimum required to create (or update) a record. However, in the case of Issues there may be other fields that are **required** based on your workflow rules.

> **NOTE: For Issue updating and creating using the importer it is important to remember that workflow rules will be enforced. Therefore required fields, Resolution/Status combinations etc. must be valid.**

When importing Issues there is an extra option on this page to **Create missing code values**. This means that if a field on your data file is mapped to a dropdown field in RMTrack, and the incoming value does not exist in that dropdown, the importer will automatically add it to the code table. Care should be taking using this option as data files with spelling mistakes in code value fields will cause the incorrect dropdown value to be added.

Data Validation



The importer will validate the data input file and report and errors. If no errors are detected clicking **Import Now** will cause the complete the import.

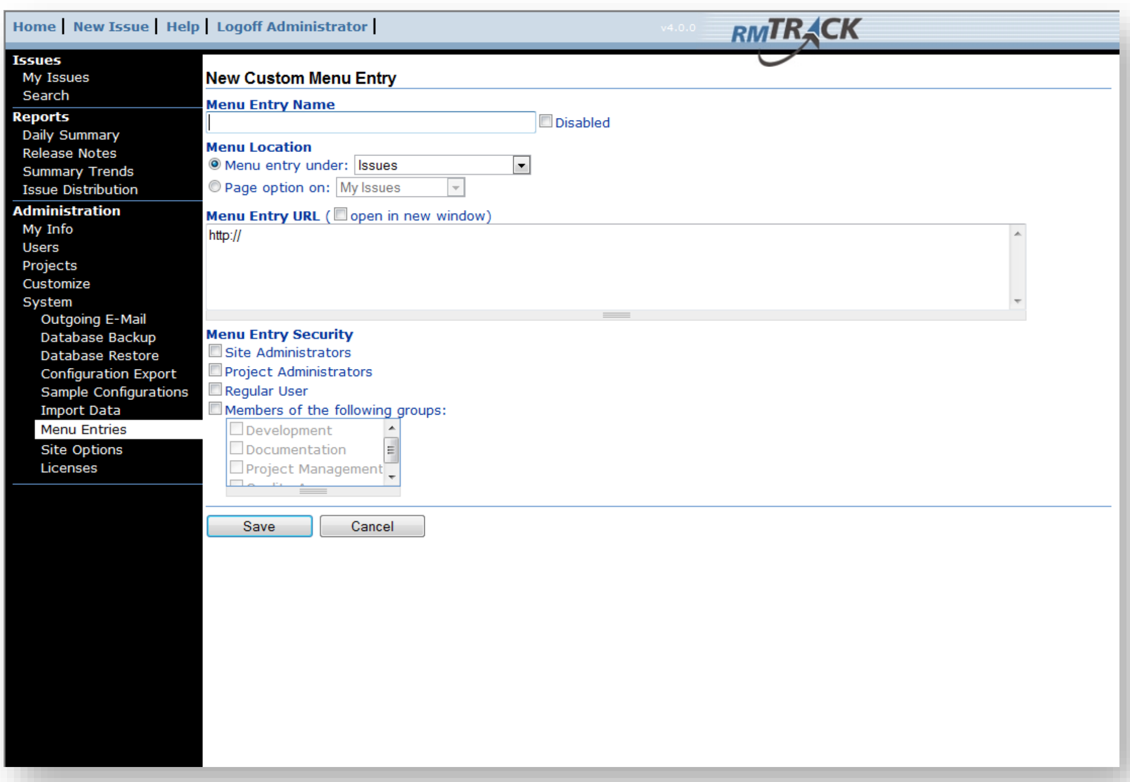
The final page of the import wizard will report the number of records imported/updated and allow you to **Start Another Import** if desired.

Menu Entries

Administrators can create their own Menu Entries in the left side menu. These menu entries can be used to add URL links to any web address or internal network location directly from left menu. These links can be published to users based on user type and/or group. Possible uses for custom Menu Entries include:

- Link to another web site – either external (internet) or internal (intranet). These websites may be associated applications, reference sites etc.
- Link to documents etc. stored on your network for reference material.
- Link to an RMTrack custom report. It is possible to use the RMTrack custom reporting feature to create update routines. It may be better to link to these under Administration, for example, than publish them as regular reports.
- To link to custom RMTrack pages. From time to time RMTrack has created or assisted in creating, custom pages for specific client requirements. These pages can be added as custom Menu entries.
- To link to Custom HTML pages stored in RMTrack. For more information please see the section Custom HTML in this guide.

To view the properties for a Menu Entry click the Menu entry name. To create a new Menu Entry click the **New** button on the Menu Entry page. To delete a Menu Entry, check the box to the left of the name and click the **Delete** button.

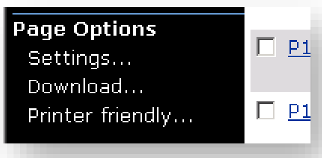


Each Menu Entry requires a name that will appear in the left menu of RMTrack.

The Menu location determines where in the menu this entry will appear. Menu Entries can appear on all pages by using the **Menu entry under:** option. Choices are under:

- Issues
- Reports
- Administration
- Each Administration sub-heading: Users, Projects, Customize, System
- Administration/Other. The Other sub-heading will only appear if there is a Menu Entry in it.

Or, Menu Entries can appear as **Page Options** for specific pages. Page Options show up after the main menu options, but only on certain pages, and can be different for each page. For example, on the My Issues page there are 3 Page Options:



Page Option Menu Entries can be added to:

- My Issues
- Issue Details
- Search
- Daily Summary (report)
- Release Notes (report)
- Summary Trends (report)
- Issue Distribution (report)

Macros for Query Strings

As mentioned above, one of the uses for Custom Menu Entries is to create a menu link to a custom RMTrack page. When used for this purpose it may be useful to pass information to the custom page, for example the issue number that was being looked at or the user that is currently logged on.

Custom menu entry URL's support inserting values from the ASP.NET programming model objects Application, Session and QueryString (in that order).

The contents of the QueryString object are dependent on the current URL. For example on the Issue Details page the IssueId QueryString value is always present (may be -1 to indicate a new issue, or a positive number to indicate an actual issue).

> **NOTE: Developing a custom page requires qualified development staff. Please contact *support@rmtrack.com* for assistance.**

Site Options

RMTrack includes optional settings that are applied on a site-wide basis. All of these options can be set or reset at any time during the life of an installation. However, it is recommended that changes to the site options only be done when users are logged off and that care is taken to explain in advance the changes being made so as to not confuse users.

Clicking on Site Options under the System menu will display a list of the options and their current settings. Clicking in the option name for each option will take you to the control page for that option.

Issues Numbering

Issues can be numbered either uniquely across all projects, or numbered sequentially within a project.

When numbered sequentially each project is given a unique prefix which is placed in front of the issue number to make it unique across all projects. The system will automatically assign a prefix to all existing projects. This prefix can be changed on the **Project Details** page.

> **NOTE: Changing from sequentially within project to unique across all projects will remove the database field IssueNumber and will cause any user defined filters that use IssueNumber to fail with the error message: Invalid column name 'IssueNumber'.**

If the database contains a large number of issues changing the issue numbering option may take some time to complete. If you need assistance with this setting please contact *support@rmtrack.com*.

Name for “Issues”

By default the name ***Issues*** is used in RMTrack. You can change this to values like **Defects**, **Concerns** or **Problems**. A singular and plural form of the name is required.

The new name will be used throughout the application, including help pages.

Careful consideration should be used before changing the name for **Issues**. Even though the help pages will use the new name, the Administration Guide and User Guide will not.

Name for “Projects”

By default the name ***Projects*** is used in RMTrack. You can change this to values like **Clients**, **Customers** or **Business Area.** A singular and plural form of the name is required.

The new name will be used throughout the application, including help pages.

Careful consideration should be used before changing the name for **Projects**. Even though the help pages will use the new name, the Administration Guide and User Guide will not.

Issue "Comments"

By default any user with access to an issue can add a **Comment** to a logged text field. Use this option to restrict this ability to only the owner of an issue. Update access to Comment fields can be further controlled at the User Group level. For more information please refer to the section **Field Level Security** in this guide.

Attachment Options

Several options are available to control the appearance of attachments on an issue.

Show date when the attachment was created

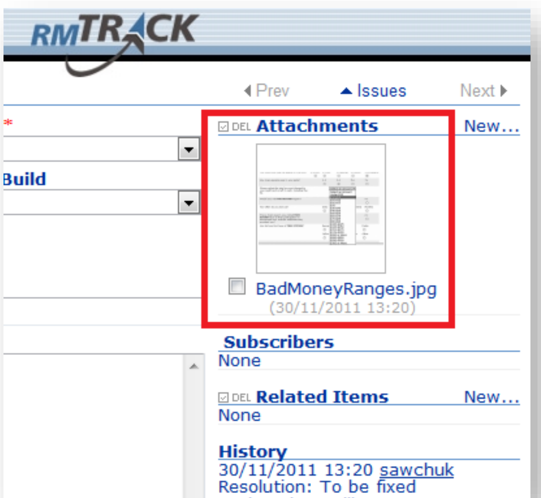
You can choose to show the date and time that an attachment was added to an issue in the attachment list on the issue details page.

Show user that created the attachment

You also show the user id of the user that added the attachment.

Show thumbnail for image attachments

When this option is enabled, image files (i.e. .JPG, .BMP, .GIF) attached to an issue will display both a thumbnail image of the attachment and the attachment name on the issue details page. Non-image type attachments will only display the attachment name.



Thumbnail images of attachments may also be displayed on the My Issues list by including the field **Attachment Thumbnail** in the Layout definition. This must appear on the last line of the Layout definition. Only image attachments can be displayed in the My Issues list.

Attachment List Sorting

You can set your preferred sort order for the attachment list on the issue details page:

- Attachment name, then newest first

- Attachment name, then oldest first
- Newest first, then attachment name
- Oldest first, then attachment name

Logon Screen Logo

Clients may use this option to upload their own company logo (or other image) to appear on the initial logon page. The RMTrack logo will move down underneath the input portion of the page.

The recommended image size is approximately 150 X 450 pixels. Larger images (specifically height) are not recommended as they can cause the browser window to scroll for the logon page.

Issue Subscriptions

RMTrack allows users to **Subscribe** to an issue. This feature is useful for keeping track of issues that are of special importance to the user. Users are able to see a list of issue they are subscribed to and optionally receive an e-mail whenever those issues are updated.

The subscription feature can be enabled or disabled from the Site Options. If enabled, you must supply an e-mail template to use for subscription e-mails. For more information please refer to the section on **E-Mail Templates** in this guide.

When subscriptions are enabled each user automatically will have a **My Subscriptions** filter available on the Issue List page to produce a list of issues they are subscribed to.

A list of subscribers to an issue is shown on the Issue Details page (on the left side under the Attachments section).

There is an additional option available to allow users to subscribe/unsubscribe other users

Access to subscriptions (visibility and ability to subscribe) is controlled at the group level under **Item Security**.

For more information please refer to the **Subscriptions** section under **Working with Issue Details** in the User Guide.

"Assign to" Filters

The My Issues page list of default filters include one filter for each member of a project (shown as **Assigned to *userid***). The Site Administrator can choose to offer these automatic filters or not. If the automatic filters are displayed each user can choose to see them or not in their personal **Settings…** for the My Issue List page.

Issues Pre-Filter

This option allows custom SQL code to be inserted before the regular RMTrack issue filtering rules. It can be used to further restrict the list of issues shown to a user. For example, certain groups could be restricted from seeing issues of a certain type by using an issue field as the test.

Example: To stop external clients from seeing internal issues:

1. Create a custom issue field (yes/no type) called **InternalIssue**.
2. Use this field on your data entry form to indicate internal and external issues.
3. Create a pre-filter that restricts members of the group **Client** from seeing issues where **Internal Issue** is YES:

```
(
   (exists(select * from UserGroups as ug
            where ug.UserId = @CurrentUserId and ug.GroupCode = 'Client')
      and Issues.InternalIssue = 0)
or
   (not exists(select * from UserGroups as ug
                 where ug.UserId = @CurrentUserId and ug.GroupCode = 'Client'))
)
```

NOTE: This option requires advanced knowledge of both SQL and of the RMTrack database. It is recommended that you contact *support@rmtrack.com* for assistance with this feature.

Server Time Zone

All new RMTrack installations have dates and times stored in Coordinated Universal Time (UTC). For those installations this Site Option is deactivated.

Older installations of RMTrack (created before V3.0) may have dates and times stored in the time zone the server operates in.

This site option allows older installations to switch from server time zone to UTC which removes uncertainly for dates and times recorded during the 1 hour period when daylight savings time switches from/to standard time.

WARNING: Changing the time zone used to store dates and times will convert any existing data. This may take some time if there is a lot of data.

NOTE: Once this feature has been set to use UTC it cannot be changed back.

Full Text Indexing

SQL allows for **full-text** search capability. Full-text searching allows searches more like Internet search engine searches and also allows the search routine to return multiple hits and assign a relevance indicator (i.e. how close the match is) to the items returned.

This site option page will allow you to create the full text indexes required for the search routine only if BOTH of the following criteria have been met:

1. You must be using SQL2005 Server or later.
2. The full text service must be installed in your SQL Server.

If you are unsure about this feature or about activating it, please discuss with your database administrator or contact support@rmtrack.com for assistance.

> **WARNING: Depending on the size of your database, adding full text indexes may take a while to complete.**

API Access

RMTrack provides a REST based API that developers can use to programmatically create or update issues. The API is included as part of the RMTrack installation but must be enabled from this site option prior to using.

Documentation for the API can be downloaded from downloads page of the RMTrack website and is located in the RMTrack program files folder on the RMTrack server (c:\Program Files\RMTrack Issue Tracking). For more information or assistance with using the RMTrack API, please contact support@rmtrack.com.

Authentication Settings

RMTrack supports two types of authentication: **Forms** and **Windows**.

Forms authentication is the default RMTrack login screen where users are requested to enter a user id and password to gain access to the application

Windows authentication bypasses the RMTrack login screen by authenticating the user based on their Windows network user id and passing that information directly to RMTrack. For Windows authentication to be successful, the Windows user id must match a user id (or **secondary** user id) set up in RMTrack.

Configuration of the authentication mode is not done through the RMTrack application. It is done by making changes to the web.config file found in the RMTrack web site virtual directory and changes to the IIS (Internet Information Services) settings.

> **NOTE: For additional information on configuring Windows Authentication for RMTrack please see RMTrack knowledge base article #09 http://www.rmtrack.com/Kb009.aspx or contact support@rmtrack.com.**

The options available for the Site Option **Authentication Settings** change based on which authentication method is being used.

Authentication Settings – "Forms"

Login Page Options - 'Keep me logged in'

If **Allow 'Keep me logged in'** is selected users will be allowed to select this option from the login page. Selecting keep me logged in will override the standard 20 minute timeout for inactive sessions and keep the user logged in.

For users with **Named user** licenses (i.e. dedicated to the user), this option is effectively the same as using 'remember me' on many web sites – their sessions will not timeout and when they access the application they will by-pass the login page.

For users with **Floating user** licenses (i.e. shared licenses), this option will *attempt* to keep the user logged in. However, a user may lose their license spot if another floating license user tries to logon and the 'keep me logged in' user has been idle for longer than the session time out parameter.

WARNING: Allowing and using '*Keep me logged in*' can weaken the security of the application as workstations left unattended could be used by unauthorized people to access the application.

NOTE: The session time out for RMTrack defaults to 20 minutes. This period can be adjusted if desired. For more information please see RMTrack knowledge base article #10: *http://www.rmtrack.com/Kb010.aspx* or contact *support@rmtrack.com*.

Login Page Options - Allow 'Forgot password'

If **Allow 'Forgot password'** is selected users will see an option on the login page for: *Trouble logging on? Forgot your password?* Clicking on the link provided will initiate the password recovery option you have chosen in this site option:

Secret question and answer – users will be prompted for their user id. If a valid user id is entered the user will then be prompted with a *secret question* and allowed to enter an answer. If correctly answered, the user will be taken to the password reset page. The secret questions and answers are set by the user from **Administration > My Info** and can also be set by a Site Administrator from the Users page. You can choose to allow the user to create their own secret question or force them to pick from a set of predefined questions.

Send a password reset e-mail – users will be prompted for their e-mail address. If RMTrack finds a user account with the entered e-mail address an e-mail will be sent to that address. The e-mail sent will use the e-mail template indicated in the site option settings. The e-mail template must contain the macro **[PasswordResetUrl]** which will allow RMTrack to send a link to the user that will take them to the password rest page. For more information please see the section on **E-Mail Templates** in this guide.

NOTE: The e-mail address entered must match one, and only one, user account for the password reset e-mail to be sent. This process will not work if multiple user ids have the same e-mail address.

Password Strength Requirements

RMTrack can enforce certain password strength criteria by forcing users to set passwords that meet the following rules:

- Minimum password length
- Minimum number of uppercase characters
- Minimum number of lowercase characters
- Minimum number of digits
- Minimum number of punctuation characters

Authentication Settings – "Windows"

Alternate User Id

Selecting the **Use Secondary User Id** option adds a separate user id in RMTrack for the Windows Authentication process. Secondary user ids are useful when the Windows ids are *meaningless* e.g. "5935jd" instead of "John Doe".

Logoff Action

Selecting the **Clears browser authentication cache** option forces the clearing of the browser's authentication cache. This means that when RMTrack is accessed via the **internet** using the Windows Authentication, the user will be prompted for logon credentials if they logoff and then logon again.

Licenses

The Licenses page shows each RMTrack license key in your installation, the type of license (Floating, Named, or Demo), and the total number of users allowed by each license.

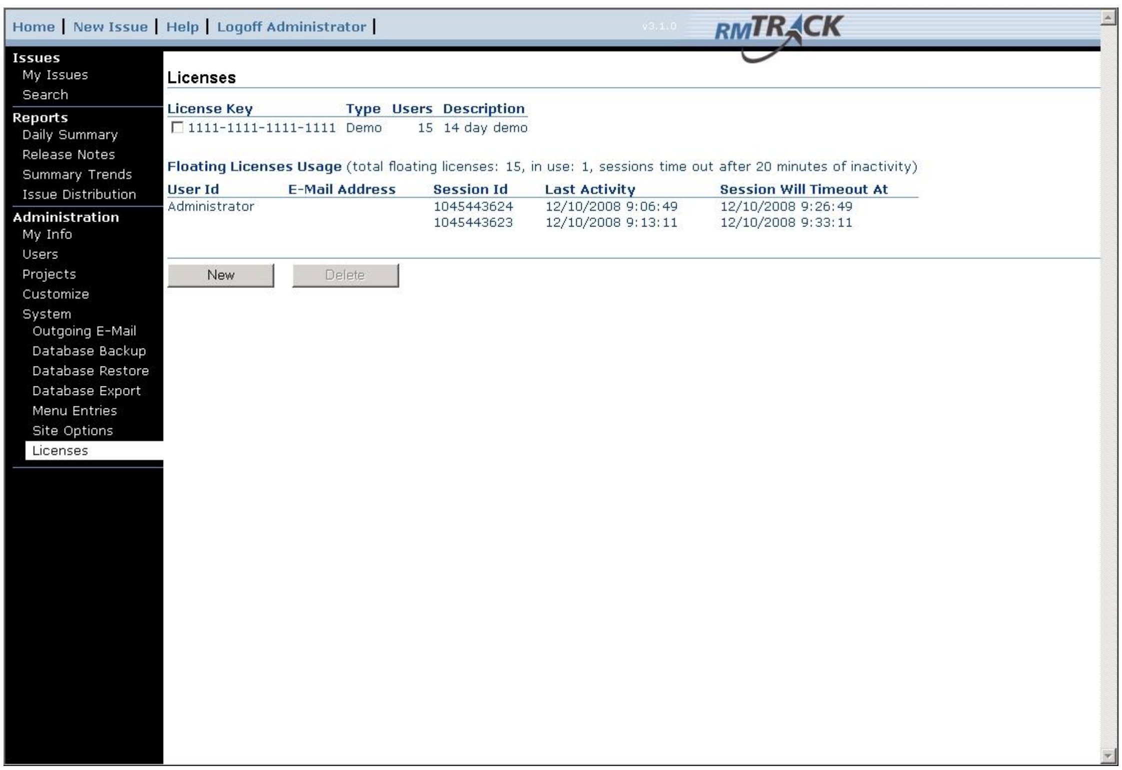
The page also shows the current license usage and the current session timeout value.

There is also a list of the users currently logged on showing User Id, E-Mail Address, Session Id, Date and time of Last Activity and the time the session will timeout.

A single user can be logged in multiple times but will only count as one license instance.

> **NOTE: The session time out for RMTrack defaults to 20 minutes. This period can be adjusted if desired. For more information please see RMTrack knowledge base article #10: *http://www.rmtrack.com/Kb010.aspx* or contact *support@rmtrack.com*.**

To add a new license key, click the **New** button on the license page. On the following page enter the new license key. To remove a license select the license and click **Delete.**



For more information on licensing types please refer to the section **RMTrack Licensing** in this guide.

Contact Information

At RMTrack we want your feedback! Please feel free to contact us, anytime, with questions, comments or inquiries:

General: inquiries@RMTrack.com

Support: support@RMTrack.com

Sales: sales@RMTrack.com

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Issue Tracking for IT Professionals