



# *User Guide*

*Version 4.0*

*Updated May, 2012*

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## Overview

### *Notes for this Document*

- **This document** is intended for all RMTrack users. RMTrack also publishes an Administration Guide which is intended for RMTrack administrators. 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 User, Administration 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](mailto: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](http://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**

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## 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*

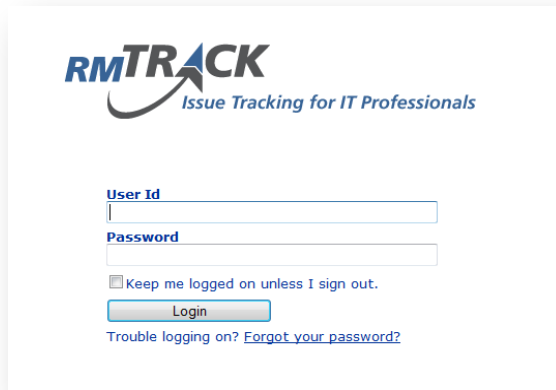
- **Issue** - the default term used for an “item” or single record in RMTrack. This default can easily be changed to reflect the items being tracked e.g. Bug, Lesson, Article, Request, etc.
- **Project** - the default term for a group of like issues. For reporting and for user access it is often desirable 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 your 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 longer 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.

## Logging In

**NOTE:** Your installation may be using an integrated login to access the RMTrack application. In that case, you will not see the following login page but will be taken directly to the Issue List page.

To begin using RMTrack an administrator needs to create your user profile and provide you with your log in credentials. Enter your username and password and then click the **Login** button.

The image shows the RMTrack login page. At the top is the RMTRACK logo with the tagline "Issue Tracking for IT Professionals". Below the logo are two input fields: "User Id" and "Password". Under the "Password" field is a checkbox labeled "Keep me logged on unless I sign out." Below the checkbox is a "Login" button. At the bottom of the form, there is a link that says "Trouble logging on? [Forgot your password?](#)".

### *Keep me logged on*

Selecting this option will override the standard 20 minute timeout for inactive sessions and keep you logged into RMTrack.

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.



## ***Forgot your password***

If you forget your password click on the **Trouble logging on? Forgot your password?** link to recover your password. RMTrack supports two types of password recovery. Depending on how your site is configured you will either be prompted with a **Secret Question** that you must have previously created an answer for or you will be asked for your e-mail address in the RMTrack site and will be sent an e-mail to that address with a link to reset your password.

## ***Don't have a user id?***

Projects in RMTrack can be set up as **Public Access** projects. When a public access project exists within the database, new users can create their own public access user id by clicking on the **Sign up for one here** link. If there are no public access projects in your RMTrack installation, this option will not appear. For more information on **Public Access Projects** please refer to the Administrator Guide.

## My Info

The **My Information** page in RMTrack allows individual users to update personal information for their user accounts

### *Name and E-Mail*

You can change your name and e-mail address as required. Each user also has the option to opt out of receiving RMTrack e-mail notifications by unchecking the E-Mail Notifications checkbox.

Home | New Issue | Help | Logoff Administrator | v4.0.1 **RMTRACK**

**Issues**  
My Issues  
Search

**Reports**  
Daily Summary  
Release Notes  
Summary Trends  
Issue Distribution

**Administration**  
My Info  
Users  
Projects  
Customize System

**My Information**

**Name**  
Administrator

**E-Mail**  
administrator@rmtrack.com

**Log-In and Security**  
[Change your password](#)  
[Change your secret question and answer](#)

**E-Mail Notifications**  
☒ I want to receive E-Mail notifications

**Preferred Time Zone**  
(UTC-05:00) Eastern Time (US & Canada)

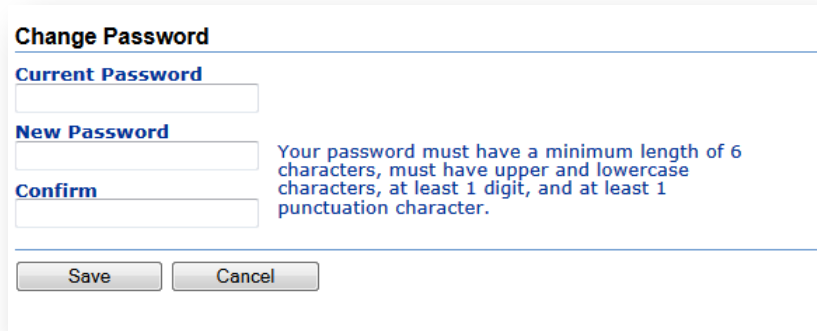
**Out of Office**  
☒ Issue assignments will be accepted (not out of office)  
☐ Issue assignments will not be accepted, [show this message when assigned issues:](#)

Save Cancel Download ActiveX... Clear Cookies...

## Log-In and Security

### Change your password

Clicking this link will take you to page where your password can be changed.



**Change Password**

**Current Password**

**New Password**

Your password must have a minimum length of 6 characters, must have upper and lowercase characters, at least 1 digit, and at least 1 punctuation character.

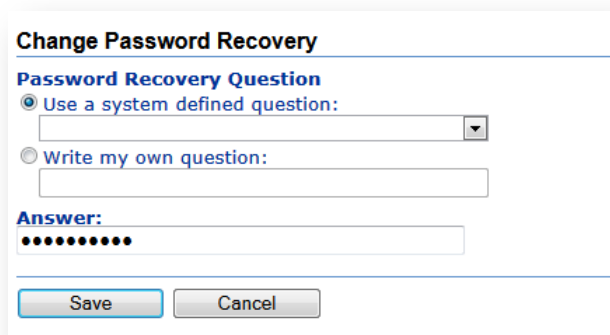
**Confirm**

You will be required to enter your existing password before entering your new password. Your site administrator controls whether there are any password strength requirements. If there are strength requirements they will be listed beside the New Password field.

### Change you secret question and answer

Clicking this link will take you to page to change your secret question and answer.

**NOTE:** Some RMTrack installations may choose to use an e-mail password recovery method instead of a secret question. If e-mail password recovery is used you will not see this option.



**Change Password Recovery**

**Password Recovery Question**

☒ Use a system defined question:

☐ Write my own question:

**Answer:**

After confirming you password you will can choose a new question and answer. Some installations may not allow you to create your own question in which case you must choose one from the list.

## *Preferred Time Zone*

All dates and times in RMTrack are stored in UTC (Coordinated Universal Time). When dates and times are displayed in RMTrack they are adjusted to each user's **Preferred Time Zone**.

## *Out of Office*

The **Out of Office** setting allows the user to temporarily not have issues assigned to them. By selecting the **Issues 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 *userid* is 'Out of Office' and cannot be assigned issues (user's message: *message*)

You can include a message to be displayed when new assignments are rejected. For example, you may wish to include the user id or name of the person covering for you while you are away.

## *Download ActiveX (button)*

Users that belong to a Security Type that allows the use of ActiveX Controls can re-download the Controls here. Please see the section on **ActiveX Controls** in this guide for more information. For more information of **Security Type settings**, please refer to the RMTrack Administration Guide.

## *Clear Cookies (button)*

This button will clear any **browser cookies** associated with RMTrack on this computer. These can include a **Keep me logged on** cookie, and an **ActiveX Control version** cookie. If you are experience problems with ActiveX Controls or Keep me logged in please use this button to clear the cookies. If you continue to have problems, contact your site administrator or [support@rmtrack.com](mailto:support@rmtrack.com).

## Working with the Issues List

The **My Issues** page is where you land after logging in to RMTrack. From this page you can view and open any issues that you have been granted access to.

By adjusting the **Project**, **Filter** and **Layout** at the top of the page you can customize your view to specific projects, specific issues and specific fields.

Clicking the **Issue #** link on an issue you will take you to the **Issue Details** page for that issue.

Home | New Issue | Help | Logoff Administrator | v4.0.1 **RMTRACK**

Issues: 9 Page: 1

Issue #	Release	Severity	Project	Module	Resolution	Assigned To	Status
<a href="#">2592</a>	2.1	Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: After booting the display shows an odd error message							
<a href="#">2593</a>	2.1	Crash	Sign Manager Server	Slideshow Configuration	New	armstrong	Open
Summary: After entering a new slideshow and clicking "Publish" the floor display shows the desktop							
<a href="#">2594</a>	2.1	Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: When checking for new updates the web page displays an error message							
<a href="#">2595</a>		Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: The test road sign cart only displays "modem failed"							
<a href="#">2596</a>		Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: Failed to Nobulate!							
<a href="#">2597</a>		High	Snap Survey	Survey Configuration	New	armstrong	Open
Summary: The sample medical survey contains incorrect questions							
<a href="#">2598</a>	3.2	Crash	Snap Survey	Security	New	armstrong	Open
Summary: Error message for security recovery email template is incorrect							
<a href="#">2599</a>	3.2	High	Snap Survey	Survey Configuration	New	armstrong	Open
Summary: The web browser sample survey is missing an age choice							
<a href="#">2600</a>	3.2	High	Snap Survey	Survey Configuration	New	armstrong	Open
Summary: The sample employment history survey contains an incorrect field type							

Resolution:  Assigned to:  Status:

## Sorting

The list of issues can be sorted by clicking on the column heading. Clicking on the heading a second time sorts in the reverse direction. The small triangle displayed at the end of a column title indicates that the list is currently sorted by this column and the sort direction.

The default sort order for the page is controlled by the selected **Layout**.

## Filtering

The **Project** and **Filter** dropdown lists allow you to filter the list of issues. By selecting a specific project only issues for that project will be shown. The **Filter** dropdown displays a list of all the filters available to you. There is a set of default filters available and you can create and publish (share) your own filters.

### Basic Filters

Filters allow the **My Issues** list to display only issues you are interested in. You can select a filter to use from the Filters dropdown on the **My Issues** list page. This dropdown will contain: System filters, published filters, personal filters and **New filter...**

RMTrack comes with several system defined filters: **Assigned to X** (where X is a team member), **Open Issues** and **All Issues**. You can also create your own filters by selecting **New filter...** from the filters dropdown. These filters can be published to other users (shared) or remain private. Published filters will show the user id of the owner of the filter in brackets after the filter name e.g. **Opened Today (by jdoe)**.

To modify a filter first select it from the dropdown, then click on the **Filter:** label. If the filter you have selected is a system filter or a published filter owned by another user you will be asked if you would like to make a copy of it. This allows you to modify system and published filters and save them as your own.

To create a new filter first select a value from the **Field** dropdown, then select a **Condition** (e.g. contains, between, etc.) and then select a **Value**. Finally click **Add to list** to add that new condition to the **Criteria**. A filter can contain multiple lines of selection criteria joined by **And** or **Or** operators. Filters also support the logical grouping of conditions using brackets and the **Not** condition.

To modify a line of the criteria, select the line in the list and click **Modify**, then change the field, condition or value and when satisfied with your changes click **Update**.

Each filter must be given a name and each filter must have a publishing setting. A filter can be private i.e. published **Only to me**. Filters can be published to **your team members** i.e. users that belong to any of the same projects as you and filters can be published to **all users** (except Public users).

Filters can also be published for use by users of specific projects by using the **To users viewing these specific projects:** option and selecting the desired projects from the dropdown. These filters will only be displayed in the dropdown list of available filters when one of those projects is selected in the Project dropdown.

**HINT:** When including a User field in the filter (i.e. Created by User or Assigned to User), the list of values will contain **@CurrentUserID**. This is especially useful for published filters so they will work for whichever user is logged on and using the filter.

By clicking on **Filters List...** at the top of the page, you will be shown a list of all your filters. You can modify these filters by clicking on them, or delete filters by checking the checkboxes beside them and then clicking the **Delete** button. The filter list also indicates the publishing setting for each of your filters.

## Advanced Filters

There may be occasions when a desired filter cannot be entered by the above method. Checking the **Advanced** filter box replaces the filter building wizard with a free form text field.

Enter the filter expression as the **WHERE** condition of an **SQL SELECT** statement. If you are looking for any issue with a module code of **Administration** the filter expression will be: **Issues.ModuleCode = 'Administration'**.

**Note:** Advanced filters require some knowledge of databases and the SQL query language. For assistance creating advanced filters please contact [support@rmtrack.com](mailto:support@rmtrack.com).

## Layouts

Layouts control which fields are shown in the **My Issues** list. When you first begin to use RMTrack the **My Issues** page will use the site **default layout** created by your site administrator. You can also create your own layouts by selecting **New layout...** from the layout dropdown. These layouts can be published to other users (shared) or remain private. Published layouts will show the user id of the owner of the layout in brackets after the filter name e.g. **Customer details (by jdoe)**.

A layout can be private i.e. published **Only to me**. Layouts can be published to your **team members** i.e. users that belong to any of the same projects as you and layouts can be published to **all users** (except Public users).

Layouts can also be published for use by users of specific projects by using the **To users viewing these specific projects:** option and selecting the desired projects from the dropdown. These layouts will only be displayed in the dropdown list of available layouts when one of those projects is selected in the Project dropdown.

To modify a layout first select it from the dropdown, then click on the **Layout:** label. If the layout you have selected is the default layout or a published layout owned by another user, you will be asked if you would like to make a copy of it. This allows you to modify default and published layouts and save them as your own.

To create layouts select **New Layout...** from the layout dropdown list. To examine or modify the currently selected layout click on the **Layout:** label. You cannot change the site default layout or layouts created and published by another user but you will have the option of copying those layouts and modifying the copy.



The data fields displayed on the **My Issues** page is determined by the fields shown in the **Displayed Fields** section of the layout designer.

To change a layout select a field from the **Available Fields** list and then move it to the **Displayed Fields** list by clicking the arrow. Fields in the Displayed Fields list can be removed by selecting them and clicking the arrow. The order of Displayed Fields can be changed by using the up and the down arrows. A new display row can be added to the layout by clicking the and rows can be removed from the layout by clicking the .

Depending on the site options chosen by your site administrator, you may have the option to insert a special field called **Attachment Thumbnails** into your layout. Any image files (i.e. .JPG, .BMP, .GIF) attached to an issue will display a thumbnail image of the attachment in the My Issues list. Non-image type attachments will not be displayed at all. Attachment thumbnails must be on the last line of the layout and must be the only field on the line.

You can choose which field the My Issues list will be sorted on by using the **Sort Order** dropdown. The direction of the sort is determined by selecting the Descending checkbox or leaving it blank (Ascending). An alphanumeric sort is used unless the sort field for the layout is a code table field (dropdown list) that uses a sort order of its own (please refer to the section on Code Tables in the Administration Guide for more

information). Any issue field may be selected as the sort field regardless of whether or not it appears in the layout.

By clicking on **Layouts List...** at the top of the page, you will be shown a list of all your layouts. You can modify a layout by clicking on it, or delete layouts by checking the checkboxes beside them and then clicking the **Delete** button.

## ***Mass Reassign***

The intended use of the **Reassign** button is to allow a group of issues to be reassigned to a different **Assign to** user or a different **Resolution** or **Status**, quickly.

If one or more issues are selected by checking the box to the left of the issue, the **Resolution**, **Assign to**, and **Status** dropdowns become enabled. Choose the desired values and click the **Reassign** button to update the selected issues. You can only select issues that you have the ability to update. Checking the box at the top beside **Issue #** will select all issues in the list you can update.

Mass reassign will enforce all workflow and assignment rules for the issues. Any issue that cannot be reassigned due to these rules will be left in its original state; all others will be reassigned.

## Issue List Page Options

When viewing the **My Issues** list page there are **Page Options** available from the left side menu bar. Three of these are standard RMTrack options:

### Settings...

You can customize certain display features and defaults of your **My Issues** page by clicking the **Settings...** menu choice under Page Options.

Home | New Issue | Help | Logoff Administrator | v4.0.1 RMTRACK

**Issues**  
My Issues  
Search

**Reports**  
Daily Summary  
Release Notes  
Summary Trends  
Issue Distribution

**Administration**  
My Info  
Users  
Projects  
Customize  
System

**My Issue Settings**

**General**  
Default project: All Projects  
Records per page: 11

**Filters**  
Default: All Open Issues  
☐ Do not show 'Assigned to X' filters  
☐ Do not show published filters  
☐ Do not show filters published to specific projects when project is not selected

**Layouts**  
Default: Default  
☐ Do not show published layouts  
☐ Do not show layouts published to specific projects when project is not selected

Save Cancel Filters... Layouts...

You can select a default Project to display when you view the **My Issues** page. The **New Issue** page will also default to this Project.

You can set the number of issues to display per page of the **My Issues** list. Higher number of issues will take longer to load.

You can choose a **Default Filter** and **Default Layout** for the **My Issues** page by selecting them from the appropriate dropdowns. You can also choose whether you want see system generated and published filters and layouts in the dropdowns by checking the appropriate checkboxes. When you have finished customizing your page, click Save.

This page also allows provides a path to maintain your personal custom Filters and Layouts. By clicking on the **Filters...** or **Layouts...** buttons you will be shown a list of layouts or filters that you have created. To modify a filter or layout click the name of the one you wish to modify. Please refer to the sections on **Filters** and **Layouts**. To delete a filter or layout, check the names you wish to delete and then click **Delete**. Clicking the **New** button will allow you to create new filters and layouts.

### Download...

You can download the list of issues as a comma separated data file (.csv) suitable for use with MS Excel or other applications. This can be very useful for reporting, or loading RMTrack data into other applications.

All issues selected by the **Project** and **Filter** dropdown choices will be downloaded. All fields displayed by the currently selected **Layout** will be downloaded. Once the desired Project, Filter, and Layout have been chosen, download the issues by clicking the **Download...** menu choice under Page Options.

You will be then be prompted to choose whether to open the file from its current location or save the file to disk.

**NOTE:** By selecting Project: All Projects, Filter: All Issues, and creating a Layout that contains all issue fields, it is possible to download all issue information from RMTrack (with the exception of attachments).

### Printer Friendly...

The list of issues can be displayed in a printer friendly format with no top or left menu structures and links disabled. Once the desired **Project**, **Filter**, and **Layout** have been chosen, click the **Printer Friendly...** menu choice. This will open a new browser window containing the information appropriately formatted for printing or e-mailing. Use your browser options to print or e-mail the pages.

## Searching for Issues

Often the best way to find specific issues in RMTrack is to use custom **filters** on the **My Issues** page. A custom filter allows you to define a very specific query on specific fields to locate issues you are looking for.

RMTrack also provides a **Search** page for locating specific issues based on **Issue #** or by **Searching for phrases** that match text issues fields. The search page is displayed by clicking on the **Search** choice in the left menu.

RMTrack can be configured to search the database in either of two ways:

### Specific Phrase

This will search the database, field by field, for the specific phrase entered in the **Search for Phrase** field. The search must find an exact match to this phrase to return results. You can use an asterisk (\*) as wildcard for searching. For example, searching for **problem\*logon** will match on the phrase *"A problem was found with the new logon page"*.

### Full-Text

RMTrack installs with Full-Text Indexing disabled. We recommend enabling Full-Text Indexing to improve the efficiency and usability of the RMTrack Search page. If the description beside *Search for phrase* on the Search page includes the text *"...use \* for wildcard..."* then your RMTrack site is not using Full-Text Indexing.

We recommend you discuss enabling this option with your site administrator. For more information on Full-Text Indexing please see the section *Site Options* in the Administration Guide.

Full-Text searches are more like internet searches and will search for each word in the **Search for Phrase** separately. The search will return a ranked list of results where the higher the rank the more likely a match it is.

Phrase matching in RMTrack is done on a field-by-field basis - not across the entire issue all at once. If the phrase matches a single field on an issue then that issue will be included in the results. Each individual comment entry is treated as a separate field and each individual history record is treated as a separate field. History records are ranked lower for matching purposes than other fields and comments.

**Multiple words (AND) search:** Each word in the search phrase must be present in any single field of the issue. For example, searching for the phrase: **problem logon** will return all issues that have at least one field that contains both the word **problem** and the word **logon**.

**NOTE:** The RMTrack search uses an implied "and" in multiple word searches. The search phrase *logon problem* translates to *logon AND problem*.

**Exact phrase search:** You can use double quotes to search for an exact match of words. For example a search phrase of: **“problem with logon”** will only return issues that contain the exact phrase problem with logon in some field on the issue.

**Either (OR) search:** You can use **OR** (capital letters) to search for either of two (or more) words. For example a search phrase of **problem OR logon** will return all issues that contain the word **problem** or that contain the word **logon**.

**Exclude word searches:** You can use the minus sign to exclude results. For example a search phrase of **problem -logon** will return all issues that have at least one field that contains the word **problem** and does not contain the word **logon**.

**Partial word (\*) match:** The asterisk character (\*) can be used as a wildcard character to match on any sequence of characters *at the end of a word*. For example a search phrase of: **log\*** will return all issues that contain the words **logon**, **login**, **logout** etc.

The screenshot displays the RMTrack V4.0 web application interface. The top navigation bar includes links for Home, New Issue, Help, and Logoff Administrator, along with the version number v4.0.1 and the RMTRACK logo. A left sidebar contains a menu with categories: Issues (My Issues, Search), Reports (Daily Summary, Release Notes, Summary Trends, Issue Distribution), Administration (My Info, Users, Projects, Customize System), and Page Options (Settings..., Download..., Printer friendly...). The main content area is titled 'Search' and features two search methods: 'Lookup Issue #' and 'Search for phrase'. The 'Search for phrase' method is selected, with a search input field containing 'test' and a 'Search' button. Below the search input, there is a dropdown for 'Selected project' set to 'All Projects' and a checkbox for 'Include closed issues'. The search results are displayed in a table with columns: Rank, Issue #, Release, Severity, Project, Module, Resolution, Assigned To, and Status. The results show one issue with Rank 80, Issue # 2595, Release 'Crash', Severity 'Sign Manager Server', Module 'Sign Interfaces', Resolution 'New', Assigned To 'armstrong', and Status 'Open'. The summary for this issue is 'Summary: The test road sign cart only displays "modem failed"'. The table also indicates 'Issues: 1 Page: 1'.

Rank	Issue #	Release	Severity	Project	Module	Resolution	Assigned To	Status
80	2595	Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open	

Summary: The test road sign cart only displays "modem failed"

## Working with Issue Details

The **Issues Details** page displays either a new issue or an existing issue.

By default only the **Assign to:** user can update an issue. Depending the configuration of the installation, all users may be able to add comments and attachments. Certain groups may be restricted from viewing or updating some fields. If you are restricted from updating a field the field will be disabled and grayed out. Site Administrators and Project Administrators (for their projects) can always update all fields of an issue regardless of who it is assigned to.

### Creating a New Issue

To create a new issue, click **New Issue** at the top of any RMTrack page. Enter the issue details by selecting the desired values from drop-down lists, entering the appropriate text, selecting dates, etc.

Some fields may be mandatory, as determined by the workflow rules. These will be indicated by a red asterisk (\*) beside the field's name. You will be prompted if any required fields have been left blank.

The screenshot shows the 'New Issue' form in the RMTrack application. The top navigation bar includes 'Home', 'New Issue', 'Help', and 'Logoff Administrator'. The left sidebar contains a menu with 'Issues', 'Reports', 'Administration', and 'Screen Capture'. The main form area is titled 'New Issue' and contains several sections: 'Project' (Sign Manager Server), 'Module' (empty), 'Issue Type' (empty), 'Severity' (empty), 'Release' (empty), 'Summary\*' (empty), 'Steps\*' (empty), 'Comments' (empty), 'Attachments' (None), 'Subscribers' (None), and 'Related Items' (None). The bottom of the form has 'Resolution: New', 'Assigned to: Automatic (armstrong)', 'Status: Open', and 'Save' and 'Cancel' buttons.

## *Updating an Issue*

Project and Site Administrators can update all fields in any issue. Depending on the security levels granted to your user id and the security settings for the user group(s) you are a member of, you may not be able to update anything on issues that are not assigned to you.

If you are the assigned user of an issue you can update any field values as long as the group(s) you belong to are not restricted from updating those fields. Depending on the setting of the Resolution and Status fields different validations are enforced by the workflow rules. Required fields will always be shown with a red asterisk (\*) beside the field's name.

## *Resolution, Assign To, Status*

All issues have a **Resolution**, an **Assign to**, and a **Status**. The possible values for these fields are derived from the workflow configuration. Users are only provided with choices that meet the workflow rules, unless they have been granted **Override Workflow** privileges by an administrator.

## *Issue Details Page Options and Tools*

When viewing the Issue Details page there are **Page Options** available from the left side menu bar.

There are also tools available on the right side of the page.

### *Issue Subscription...*

On the Issue Details page, under the Page Options is a **Subscribe.../Unsubscribe...** link. Any user can subscribe to an issue even if they are not currently assigned to it. Once subscribed, you will receive an email notification whenever the issue is updated. This feature may be deactivated by your site administrator.

**Note:** The Subscriptions options are controlled as a site option and at the group security level and may not be available on your issue page.

### *Printer Friendly...*

On existing issue details, under the **Subscribe...** link is a **Printer Friendly...** link. Clicking this link opens a new page with a printer friendly version of the issue details suitable for printing or emailing. This feature is also useful for viewing any comment fields contents all at once.



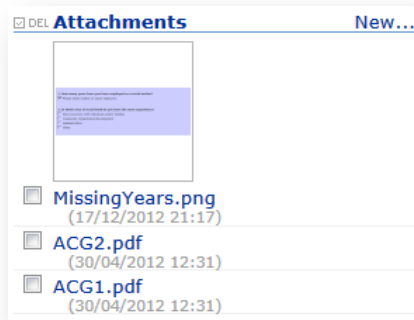
## Navigation

At the top right of the page are navigation links ◀ [Prev](#) ▲ [Issues](#) [Next](#) ▶ to allow you to move between the issues displayed by the **My Issues** page, the **Search Results** page or the **Release Notes** report.

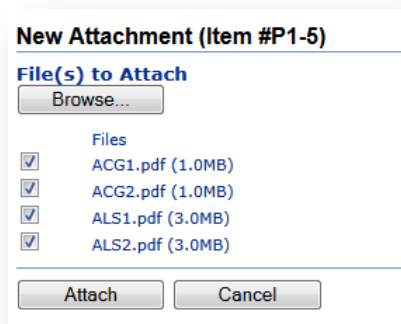
## Attachments

**Note:** The ability to add and view attachments on an issue is controlled at the group security level therefore you may not have access to this feature, you may only have *view* access, you may be able to add attachments only to issue that are assigned to you, or you may be able to add attachments to all issues.

Below the navigation links is the list of any files attached to the issue. Clicking on the name of the attachment will download the attachment to your browser. How the file is opened and restrictions on downloads are controlled by your browser.



You can attach any type of file to an issue by clicking on the **New...** link located to the right of the **Attachments** heading. From here you will be taken to a page where you will be able to browse for the file(s) you wish to attach. If you have Flash or Silverlight installed you can select multiple files to attach by holding the **Ctrl** key and clicking on each file name. After clicking the **Open** button in the file browser the selected files will be uploaded to your browser. For example:



Click the **Attach** button to complete the attachment process.

The default maximum size for an attachment is 10MB but this setting may have been changed by your administrator.

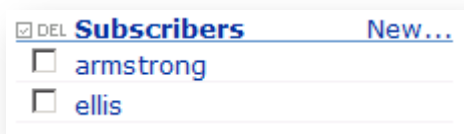
To delete an attachment select it using the check box beside the attachment name. Clicking on **DEL** will delete it immediately. Or selected attachments will be deleted when the issue is saved.

Depending on the site options chosen by your RMTrack administrator, image files (i.e. .JPG, .BMP, .GIF) attached to an issue may display a thumbnail image of the attachment.

## Subscriptions

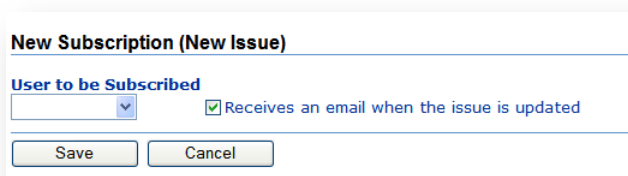
**Note:** The ability to add and view subscriptions on an issue is controlled at the group security level therefore you may not have access to this feature, you may only have *view* access, you may only be able to subscribe yourself to issues or you may be able to subscribe other users to issues that are assigned to you.

Below the Attachments section is a list of users currently subscribed to this issue.



If you are able to modify the subscription list new subscribers can be added by clicking the **New...** link.

Users can be removed from the Subscriber list by checking the box beside the user id. Clicking on **DEL** will delete it immediately or, selected users will be deleted when the issue is saved.

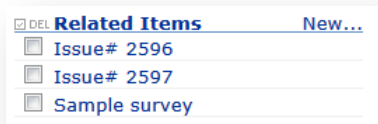


Clicking on a user id in the subscription list will present the option to enable or disable email notifications for that user.

## Related Items

**Note:** The ability to view and add related items is controlled at the group security level. Some users may not be able to add or see related items.

Below the Subscriptions section (or Attachments section if the subscription site option is not turned on), on the right side of the Issue Details page is the Related Items section. Related items are links to information related to this issue.



You can create a related item entry by clicking on the **New...** link.

To delete a related item, select it using the check box beside the item name. Clicking on **DEL** will delete it immediately. Or selected items will be deleted when the issue is saved.



There are two types of related items:

**Related Issues** - Entering a valid issue number will create a link to that issue. It will also create a link on the target issue back to the current issue. Deleting the link from either issue will remove it from both issues. Users can only create links to issues that they have access to based on their project and group membership. If links are present to issues that a user does not have access to they will not be displayed to that user.

**Uniform Resource Locator (URL)** - URL's can be entered as related item links on an issue. URL's can point to a web site or files located on a network server. When the related item link is clicked it can open in a new browser window or re-use the open one. You can also provide a meaningful name (display title) for the link.

## Issue History

**Note:** The ability to view Issue History is controlled the group security level. Some users may not see the issue history.

Below the Related Items section is the Issue History section. Each time an issue is saved, RMTrack will create a history record logging the changes to the issue. These history records appear in reverse date order.



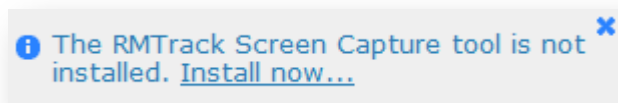
Each history entry shows the date and time that the issue was last saved and the user id that saved it. It also shows the resolution, assigned to, and status at the time of saving. Each history entry also has a **details...** link to the full audit history record. Clicking on this link will open a new Internet explorer window with the full audit trail details for that **save** of the issue.

**NOTE:** Field level security restrictions may prohibit access to the history details. If your group membership restricts you from viewing certain fields, you will not be able to access history details and the *details...* link will not be displayed.

## ActiveX Controls

RMTrack includes a screen capture feature only available to IE users with RMTrack ActiveX Controls installed.

Users that belong to a Security Type that allows the use of ActiveX Controls will be prompted to download the Controls the first time they view the Issue Details page.





PC/User security settings need to allow Signed **ActiveX Controls** to be installed on the PC.

Once the ActiveX Controls have been downloaded to the PC, users on that PC will not be requested to download again unless cookies are cleared or the ActiveX Controls are updated on the server i.e. a new release of RMTrack.

If the user chooses the Run without the ActiveX Controls option from the above screen, they will not be prompted to download them again. At any time users that belong to a Security type that allows ActiveX Controls can re-download the Controls from the **My Info** page under Administration in the left side menu.

## RMTrack Screen Capture Tool

**Note:** This feature is only available when accessing RMTrack with an Internet Explorer browser and with RMTrack ActiveX Controls installed. Also, the ability to add attachments to an issue is controlled at the group security level therefore you may not have access to this tool.

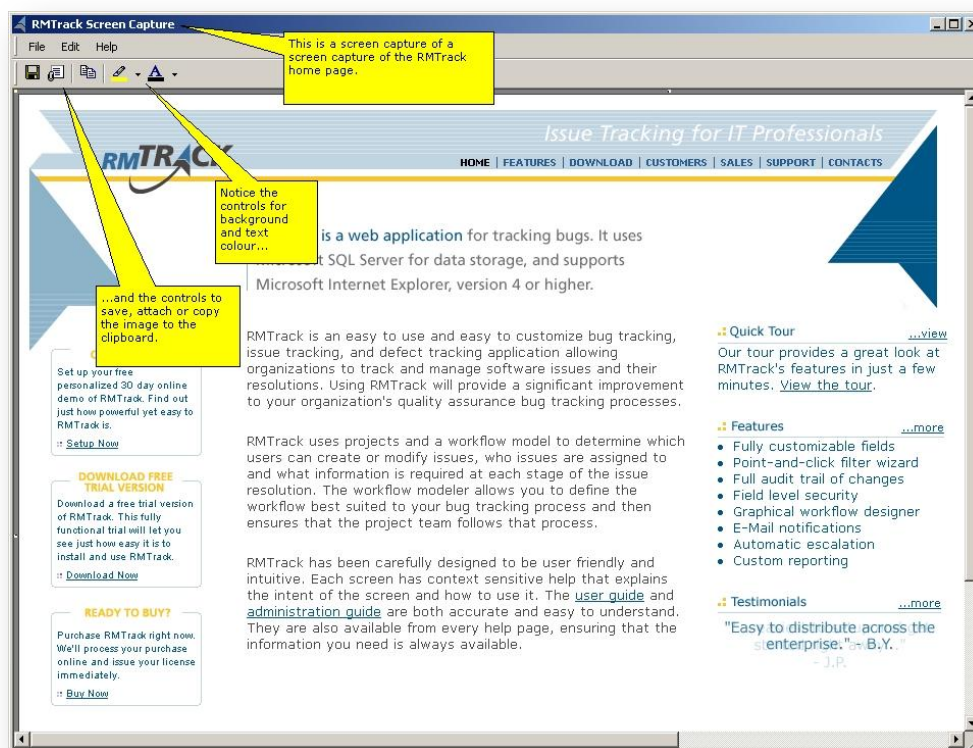


At the bottom left of the Issue Details page for both new and existing issues, is the RMTrack Screen Capture Tool icon. Use this tool to capture screen images, make notations on the image and then attach it directly to the issue.

Click on the icon to minimize the RMTrack browser window and drag the icon to window you want to capture. A thick black line will highlight the border of the area that will be captured. When you release the mouse button, the RMTrack window will be restored and a new window will open with the captured screenshot in it.

Annotations can be added to the screenshot to highlight points of interest. Click on the screenshot and drag to create a notation box. Background and text color can be changed with the controls at the top left of the window. Save the image and/or upload the image as an attachment to the current issue.

Below is a screen capture of a screen capture of the RMTrack website. Note the yellow annotation boxes.



## Working with Reports

The main reporting tool in RMTrack is the **My Issues** page described earlier in this guide. By defining a custom filter you can report on the exact issues you want. By defining a custom layout the exact the fields you need are displayed. The **Printer friendly...** function allows you to print or e-mail the list of issues. The **Download...** function allows you to export the data to Excel for further processing.

There are 4 **stock reports** reports available including; **Daily Summary** that summarizes a project team's activity, **Release Notes** that details what issues have been addressed by a particular build, **Summary Trends** that shows how the project is operating over time, and **Issue Distribution** summarizing issues by the various codes (build, module, etc.).

**Note:** Report access is controlled at a User Security Type level and you may not be able to see some reports.

Users belonging to a group set as *restricted access* (i.e. only able to see issues they created or were assigned to) will not have access to the Daily Summary report or the Release Notes report.

## Custom Reports

RMTrack administrators can define custom reports for their installations. Custom reports are very flexible and can report on any data in the RMTrack database. Please refer to the **Reporting Guide** for complete details.

Custom reports can be published a group level allowing some user access to some reports but not others.

## Stock Reports

### Daily Summary

The **Daily Summary** report helps teams stay on top of project activity. Select to view the activity for one project or for all projects. Select to view all of yesterday's, today's, this week's, last week's, last month's or this month's activity.

The report summarizes activity by each team member. There is a checkbox that can be used to eliminate users with no activity for the period chosen. Clicking on the plus sign located beside the team member's name will expand each team member's activity. Once expanded, the report will display a list of the issues worked on by the team member using the layout of your choice from the Layout dropdown list.

Home | New Issue | Help | Logoff Administrator | v4.0.1 **RMTRACK**

**Issues**  
My Issues  
Search

**Reports**  
Daily Summary  
Release Notes  
Summary Trends  
Issue Distribution

**Administration**  
My Info  
Users  
Projects  
Customize  
System  
Page Options  
Printer friendly...

**Daily Summary**  
Project: All Projects Period: This week Layout: Default ☐ Only show users with activity

**Project Team Activity**

User Id	# Issues	# Changes
armstrong	5	5
bower	0	0
ellis	0	0
keon	0	0
pappin	0	0
sawchuk	4	4

Issue #	Release	Severity	Project	Module	Resolution	Assigned To	Status
2596	Crash	Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: Failed to Nobulate!							
2595	Crash	Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: The test road sign cart only displays "modem failed"							
2594	2.1	Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: When checking for new updates the web page displays an error message							
2593	2.1	Crash	Sign Manager Server	Slideshow Configuration	New	armstrong	Open
Summary: After entering a new slideshow and clicking "Publish" the floor display shows the desktop							
2592	2.1	Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: After booting the display shows an odd error message							

## Release Notes

The **Release Notes** report details issues that have been addressed, or not addressed, by a particular build. The “Detected in Build”, “Resolved in Build” and “Verified in Build” fields are keys to this report’s accuracy. This report will only be available if your installation of RMTrack uses the default build code fields installed with RMTrack: Detected in Build, Resolved in Build and Verified in Build.

Select the **Project**, the **Build being released**, and the **Previously released build** to display the report.

The report has two sections: “Fixed Issues” and “Known Issues”. Each section of the report will display using the layout chosen from the Layout dropdown list. Each section can be independently sorted by clicking on the column headers. The entire report can be printed, or e-mailed, using the “Printer friendly...” option at the bottom left. Each section of the report can be downloaded using the “Download X...” menu choice at the bottom left.

The criteria used for determining Fixed Issues is:

Valid = Yes  
and Fixed = Yes  
and Detected In Build <= Previously Released Build  
and Verified In Build > Previously Released Build  
and Verified In Build <= Build Being Released




The criteria used for determining Known Issues is:

Valid = Yes

and Fixed = No

and Detected In Build < Build Being Released

and Status = 'Open'

[Home](#) | [New Issue](#) | [Help](#) | [Logoff Administrator](#) |
 v4.0.1


**Issues**  
[My Issues](#)  
[Search](#)

**Reports**  
[Daily Summary](#)  
[Release Notes](#)  
[Summary Trends](#)  
[Issue Distribution](#)

**Administration**  
[My Info](#)  
[Users](#)  
[Projects](#)  
[Customize](#)  
[System](#)

**Page Options**  
[Download fixed...](#)  
[Download known...](#)  
[Printer friendly...](#)

**Release Notes**  
Project: Sign Manager Server Release build: 2.1.0.168 Previous build: 2.1.0.168

**0 Fixed Issues** Layout: Default

**5 Known Issues** Layout: Default

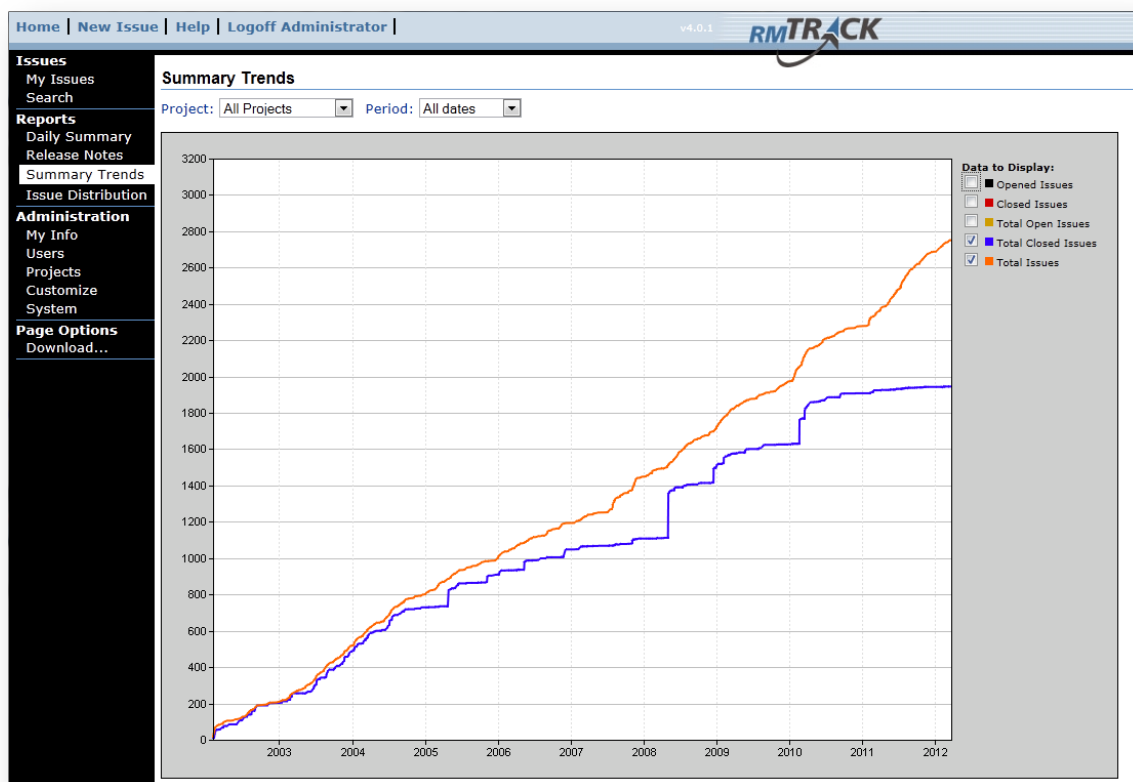
Issue #	Release	Severity	Project	Module	Resolution	Assigned To	Status
<a href="#">2596</a>		Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: Failed to Nobulate!							
<a href="#">2595</a>		Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: The test road sign cart only displays "modem failed"							
<a href="#">2594</a>	2.1	Crash	Sign Manager Server	Installation	New	armstrong	Open
Summary: When checking for new updates the web page displays an error message							
<a href="#">2593</a>	2.1	Crash	Sign Manager Server	Slideshow Configuration	New	armstrong	Open
Summary: After entering a new slideshow and clicking "Publish" the floor display shows the desktop							
<a href="#">2592</a>	2.1	Crash	Sign Manager Server	Sign Interfaces	New	armstrong	Open
Summary: After booting the display shows an odd error message							

## Summary Trends

The **Summary Trends** report is a graphical representation of project progress. Each project can be measured by examining the number of new issues being logged vs. the number of issues being closed over time.

To view the report, click on the “Summary Trends” choice in the left menu. Use the dropdowns at the top of the page to select the project and the desired time-period. The graph will always show “Total Open Issues”. In addition, the following information can be placed on the graph by selecting it from the “Add” button on the right:

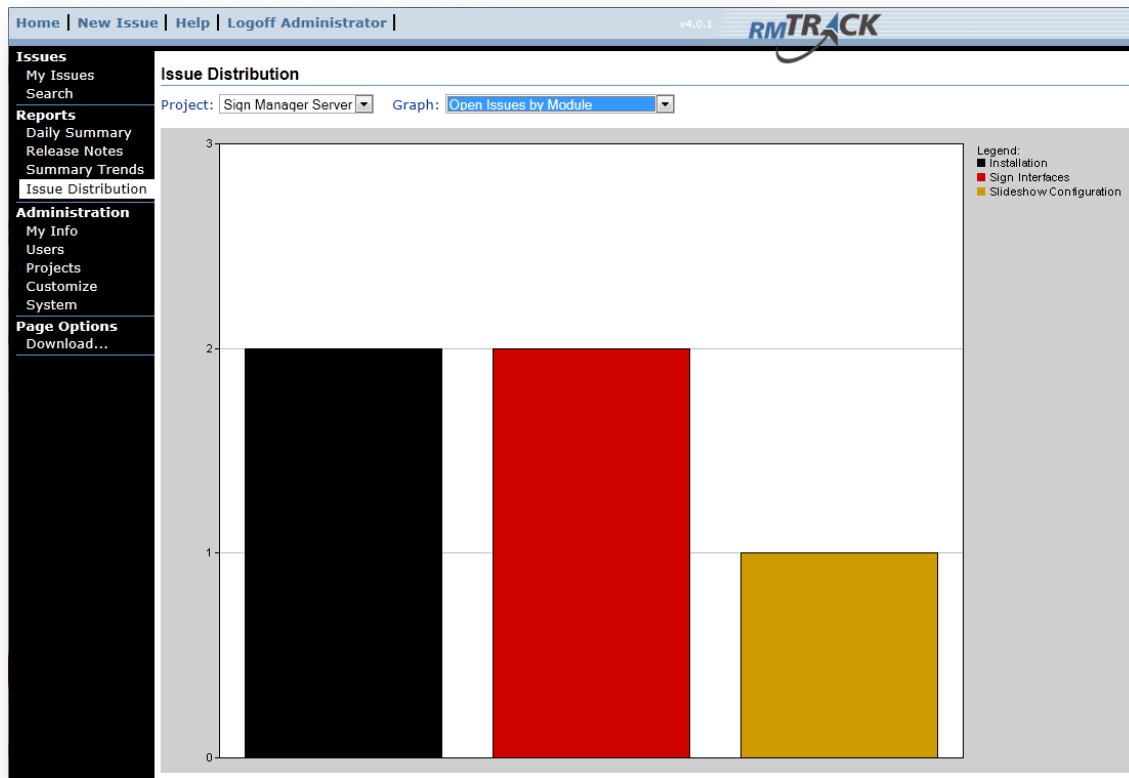
- New Issues
- Closed Issues
- Total Closed Issues
- Total Issues



The **Download...** link at the bottom left of the page allows the raw graph data to be exported to a comma delimited (.CSV) type file. You will be prompted to choose whether to open the file from its current location or save the file to disk.

## Issue Distribution

This report allows you to examine a project's issues in a variety of categories. Select the project, and from the **Graph** dropdown list select the desired category to view.



Examples of how the Issue Distribution report can be used:

- To determine workload. You can quickly see which team members have the most issues assigned to them. If one team member is overloaded adjustments may be required.
- To determine module stability. If a module has had more issues logged against it than others than this is a strong indication of the module's stability.

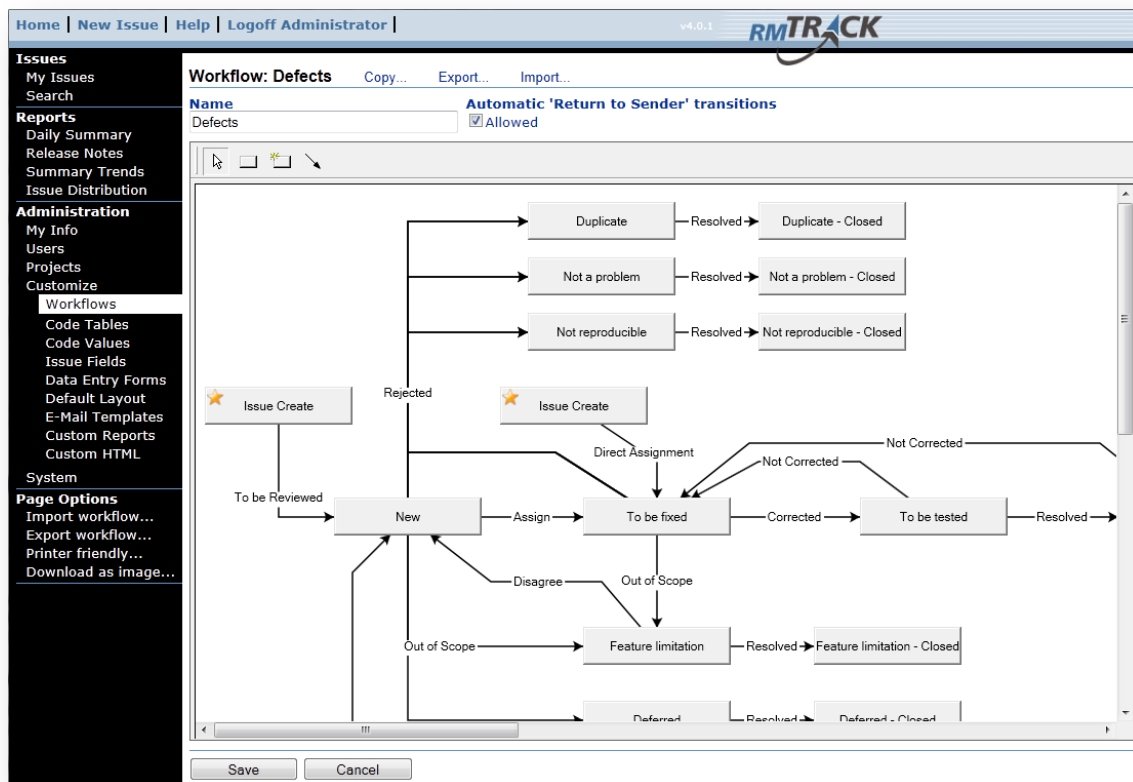
The **Download...** link at the bottom left of the page allows the raw graph data to be exported to a comma delimited (.CSV) type file. You will be prompted to choose whether to open the file from its current location or save the file to disk.

## Understanding Workflow

**Note:** To view the workflow diagram using IE8 requires the RMTrack ActiveX Controls to be installed (please ActiveX Controls in the Issue Details section for more information). All other browsers use an HTML5 version of the diagram.

**Workflow** is the set of rules that determine the flow of an issue through the issue resolution process. Workflows also determine the rules for what information is required and who an issue can be assigned to. Each project can have its own workflow and workflows may be used by more than one project.

Your site administrator will have determined whether you have access to view the workflows for your projects. If available, you will have inquiry mode only from the **Workflow** choice in the left menu (under Administration). This will show a list of workflows that are used by projects that you belong to. When a workflow is selected the diagram loads and the user can double click on the boxes (Resolution States), and on the lines between the boxes (Transitions), to see the configuration details and rules.



For more information on *Workflows* please refer to the section on workflows in the Administration 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](mailto:inquiries@RMTrack.com)

Support: [support@RMTrack.com](mailto:support@RMTrack.com)

Sales: [sales@RMTrack.com](mailto:sales@RMTrack.com)

Web-Site: [www.RMTrack.com](http://www.RMTrack.com)

Phone: 416-929-1720

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