NetResults ProblemTracker

Workgroup Management System Guide Help Topics

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Overview - Workgroup Management System (Multiple Project Support)

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The Workgroup Management System Guide contains information for installing and maintaining multiple ProblemTracker workgroups (projects). At the physical level a workgroup consists of a set of web pages (part of a web site or its own separate web site) and a single database. At the logical level a workgroup is a place (web site) where a group of users can collaborate on a common project. The functions in the Workgroup Management System are distinct from the Administrative operations within a particular workgroup (database). The Administrator's Guide contains information for operations within each workgroup, such as user administration and workflow settings.

Supporting Multiple Projects

It is common for ProblemTracker to be called upon to handle the requirements of several independent projects. Different product development teams, IT departments, or customer support organizations may wish to use the system at the same time, with slightly differing needs. ProblemTracker supports multiple projects, including independent customization for each project - on a single server.

Single Workgroup

If projects all share a common data record ("form" to submit & track issues), any number of projects can be supported using a single ProblemTracker workgroup installation. The Product field (which can be re-named to something such as Project or Division via the Administrator interface if groups are not organized along product lines) can be used to distinguish records for each project. The "Product" field can be used to create a separate workflow (automatically assign issues to different users, use different email notification rules, go through a different set of workflow states/steps, etc.) for each project/product. If you have a common data record you only need to create a single workgroup (or simply use the pteval workgroup that you, optionally, created during installation).

Multiple Workgroups

If the various groups using ProblemTracker have a different data requirements (different "forms" to submit & track issues), then each project can be configured as its own workgroup. ProblemTracker supports this by allowing you to install any number of ProblemTracker workgroups on the same server. Each workgroup can be independently customized and accessed via a unique web address (URL). Even if the data requirements are very similar for various groups, you may also wish to create independent workgroups if the organizations are very separate so that each workgroup can be maintained independently (each with its own administrator). This can also simplify the process of moving a workgroup to a new machine (without affecting the existing workgroups) should organizational changes or access requirements (e.g. support needs to allow outside access to the system and therefore must run on a web server outside your firewall) necessitate a move to a separate ProblemTracker installation. Independent workgroups may also be required for security reasons (if physically separate databases or web sites are required). Within each of these independent workgroups, you can still use the "Product" field to create separate workflows for different product lines, departments, types of requests to be processed, etc. Just change the label for the "Product" field as you see fit (e.g. to Department, Request Type, etc.).

Workgroup Management System

The Workgroup Management System (WMS) is the administrative interface for maintaining multiple ProblemTracker workgroups. Within WMS, the following actions can be performed for each workgroup:

- Add
- View
- Edit
- Delete
- Manage User Accounts
- Manage Aliases
- Move to another location
- Migrate to another database type
- Repair

These options can be selected clicking on the buttons in the Button Bar or by clicking on the icons to the left of each workgroup listed on the Workgroup Management System Home Page.

It is recommended that you temporarily disable any anti-virus software while you perform configuration in the Workgroup Management System (WMS). This is suggested so that your anti-virus software will not prevent WMS from performing operations such as copying files, running scripts, configuring your web server, setting file permissions and registry entries. Your anti-virus software can be reactivated safely after you have completed any necessary WMS configuration.

The Workgroup Management System has an Admin section where additional operations can be performed for each workgroup:

- WMS User Administration - Change WMS User Password
- Synchronize ProblemTracker Anonymous Account (PUSR4*hostname*) Password in WMS
- View Common Parameters used by WMS
- Edit Common Parameters used by WMS
- Log Workgroup Information
- Block and Unblock Workgroups
- Manage Web Server Security
- Manage Workgroup Database Operations
- Upgrade Workgroups from Version 3.x to Version 5.5
- Upgrade Workgroups from Version 4.x and 5.x to Version 5.5
- Other Maintenance Operations

To perform an operation in the **Admin** section of the Workgroup Management System, select an option using the radio button to the left of the option desired, then click on the **Continue** button.

Individual sections of this Help documentation can also be accessed from within the Workgroup Management System by clicking on the Help link in the upper right corner of each page.

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Workgroup Management System Guide Glossary

Glossary of Terms

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

- Add (WMS) - Adding a Workgroup
- Add Multipart Email - Adding a Workgroup
- Add User (WMS) - Adding a User
- Adjust for Daylight Saving Time - Adding a Workgroup
- Admin (WMS) - Logging into Workgroup Management System
- Alias - Managing Aliases
- Blocking and Unblocking Workgroups - Blocking and Unblocking Workgroups
- Character Set - Adding a Workgroup
- Comment - Adding a Workgroup
- Create Tables - Workgroup Database Operations
- Database Location - Adding a Workgroup
- Database Name - Adding a Workgroup
- Database Type - Adding a Workgroup
- Delete (WMS) - Deleting a Workgroup
- Delete Tables - Workgroup Database Operations
- Delete User (WMS) - Deleting a User
- Description - Adding a Workgroup
- Edit (WMS) - Editing a Workgroup
- Edit Common Parameters - Editing Global Workgroup Information
- Edit User (WMS) - Editing a User
- Edit User Access - Editing a Workgroup's List of Users
- Edit Workgroup Access - Editing a User's Access to a Workgroup
- Email Header Encoding - Adding a Workgroup
- Export Tables - Workgroup Database Operations
- Home (WMS) - Logging Into Workgroup Management System
- Host Name - Adding a Workgroup

- Import Tables - Workgroup Database Operations
- Initialize Tables - Workgroup Database Operations
- IP Address - Adding a Workgroup
- List Users - List Users
- Log In to Workgroup (WMS) - Logging into Workgroup Management System
- Log Workgroup Information to a file - Logging Workgroup Information
- Manage Web Server Security - Managing Web Server Security
- Manage Workgroup Database Operations - Workgroup Database Operations
- Migrate - Migrating a Workgroup
- Move (WMS) - Moving a Workgroup
- Move a Database from one machine to another - Moving a Workgroup
- Move a Workgroup within the same web server machine - Moving a Workgroup
- Move Populate Workgroup based on PTAdmin Database - Moving a Workgroup
- Name - Adding a Workgroup
- Physical Path - Adding a Workgroup
- Port Number - Adding a Workgroup
- Repair - Repairing a Workgroup
- Summary - License Summary
- Synchronize ProblemTracker Anonymous Account - Synchronize Anonymous Account
- Synchronize User - Synchronizing a User
- Template - Adding a Workgroup
- Time Zone - Adding a Workgroup
- Upgrade a Workgroup from 3.x - Upgrading 3.x Workgroups
- Upgrade a Workgroup from 4.xor 5.x - Upgrading 4.x or 5.x Workgroups
- Upgrade Data Only - Workgroup Database Operations
- Upgrade Users - Upgrading 4.x or 5.x Workgroups
- User Administration (WMS) - User Administration - Workgroup Management System
- User Character Set - Adding a User
- Users (WMS) - License Administration - Overview
- Version - Viewing a Workgroup
- View (WMS) - Viewing a Workgroup
- View Common Parameters - Viewing Global Workgroup Information
- Web Site - Adding a Workgroup
- Workgroup - Overview of Workgroup Management System

- Workgroup Location - Adding a Workgroup
- Workgroup Management System - Overview of Workgroup Management System
- Workgroup Database Tools - Logging into Workgroup Management System

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Logging Into Workgroup Management System

It is recommended that you temporarily disable any anti-virus software while you perform configuration in the Workgroup Management System (WMS). This is suggested so that your anti-virus software will not prevent WMS from performing operations such as copying files, running scripts, configuring your web server, setting file permissions and registry entries. Your anti-virus software can be reactivated safely after you have completed any necessary WMS configuration.

During installation, Authentication (Basic and NT or Windows Integrated) is configured for the Workgroup Management System login page and Anonymous Access is disabled. This will cause the web server to require that all users (browsers) authenticate themselves. Netscape browsers will use Basic authentication (a dialog will pop up requesting user name and password). Internet Explorer browsers will use NT (IIS 4.0) or Windows Integrated (IIS 5.0, 6.0) authentication. Internet Explorer may implicitly authenticate you (if you are already logged in as a user known to the web server) or it may pop up a dialog that asks you to enter your user name, password, and domain. In all cases, you should both be logged in to Windows (NT/2000/2003) as a user with local Administrator privileges on the web server machine and, if prompted, enter the user name of a user with local Administrator privileges on the web server (e.g. Administrator). Domain Administrator privileges may not be sufficient. If you are not authenticated as a user with local Administrators privileges then you will not be able to perform all operations in WMS (some operations will fail). WMS will warn you about this at login time. If you see this warning, please exit your browser window and try again.

To login to the Workgroup Management System, browse to the following URL:

http://*localhost*/*ptadmin*/uwslogin.asp

localhost indicates the web server on the local machine. To access the Workgroup Management System from a remote machine the URL is:

http://*servername*/*ptadmin*/uwslogin.asp

servername indicates the TCP/IP name of the machine where ProblemTracker is installed.

In both cases above, you can omit the "/uwslogin.asp" at the end, as we have configured uwslogin.asp (the login page) as the default page for the ptadmin virtual directory.

By default during the installation process, setup configures your web server (IIS) such that the Workgroup Management System (WMS) inherits any IP Address configuration or restrictions set on the web site where you chose to install ProblemTracker. If you wish to apply more security to your Workgroup Management, such as only allowing WMS to be accessed locally, please refer to the following entry in our Frequently Asked Questions section at:

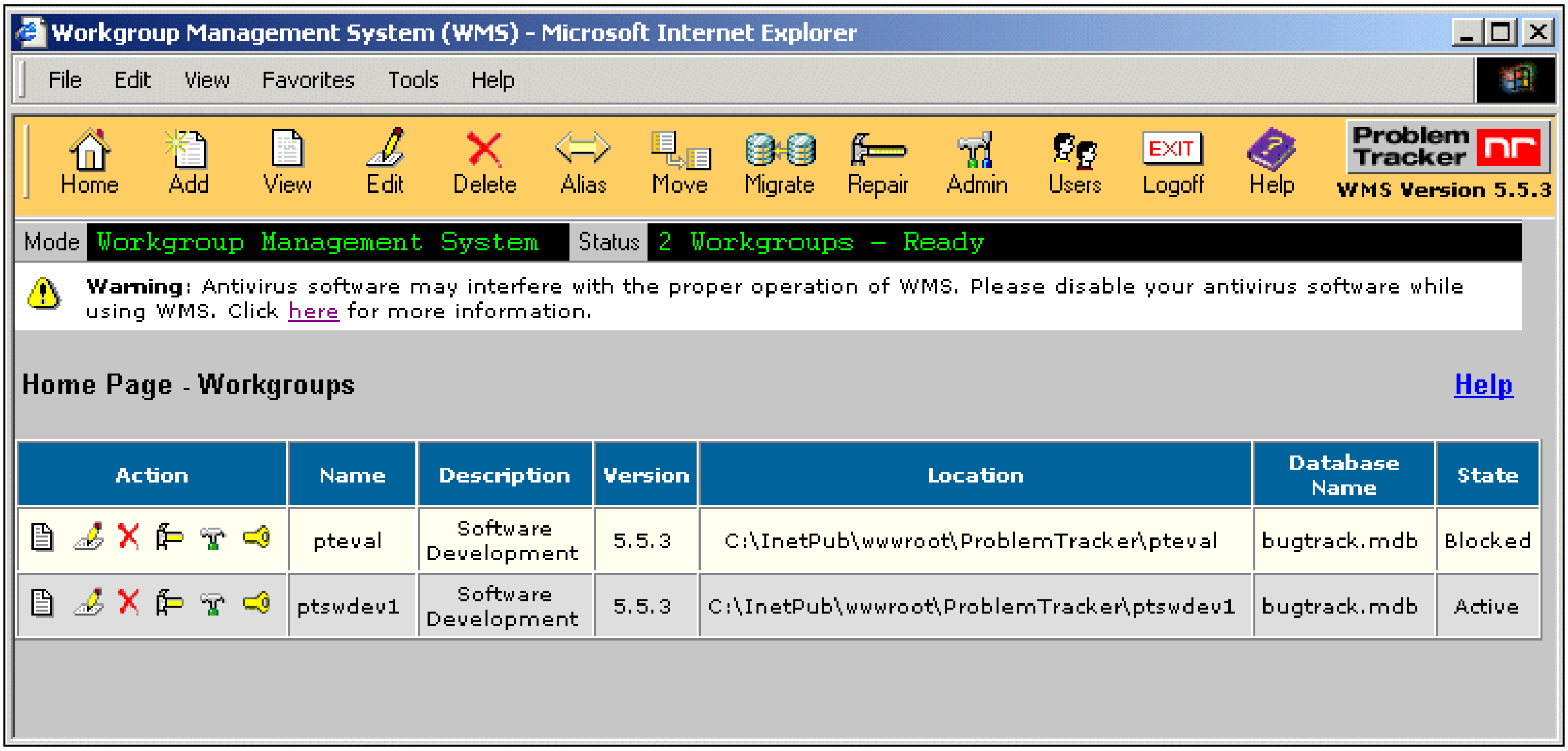
http://www.problemtracker.com/pt_faq_howdoi4x.htm#wmssecurity

When you are presented with the Workgroup Management System login screen, enter **ptadmin** as the username and the corresponding password to log in. The initial **ptadmin** user password is "ptadmin". It is recommended that you change this default password during your first login session. Information on changing your password is available in the section WMS User Administration.

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

The Home Page

After logging in, the first screen you will see is the Workgroup Management System Home Page.



This page will show all workgroups that are currently installed. Certain actions, such as View, Edit, Delete, Login, Repair and Database Tools can be performed using the icons to the left of each Workgroup Name. Other actions can be performed by using the icons in the top Button Bar.

View

Please review the section Viewing a Workgroup for more information.

Edit

Please review the section Editing a Workgroup for more information.

Delete

Please review the section Deleting a Workgroup for more information.

Repair

Please review the section Repairing a Workgroup for more information. This icon will not appear for a workgroup which has not been upgraded to the latest version using one of the upgrade options in the Admin menu.

Workgroup Database Tools

The Database Tools page for a workgroup can be accessed by clicking on the Workgroup Database Tools icon to the left of the workgroup name on the Workgroup Management System Home Page. As the operations in the Workgroup Database Tools page can make irreversible changes to your database, these tools should be used with extreme care and only in accordance with the procedures listed in this Help document or in the Frequently Asked Questions section of the NetResults web site.

Login

To login to a workgroup from the Workgroup Management System Home Page, click on the login icon to the left of the workgroup. A separate window will be launched with the login page for the workgroup.

You can also login to a workgroup by browsing directly to:

http://*servername*/*workgroup*/ptlogin.asp

servername indicates the TCP/IP name of the machine where ProblemTracker is installed.

If a workgroup has not been upgraded to the latest version by using one of the upgrade options in the Admin menu, you will not be able to login to the workgroup. The version for each workgroup is displayed in a column on the Home Page.

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Adding a Workgroup

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If you are adding a workgroup using Oracle as your database type, please perform the procedure outlined in the Using Oracle 8i (or later) Database Help section. Once you have completed these steps, return to this section and follow the procedure listed below.

Click on the Add button on the Button Bar to add a new workgroup. You will be prompted to fill in the following fields in order to create the new workgroup:

- **Name**
  A brief name to identify the workgroup. Example: productX

- **Description**
  A description of the workgroup.

- **Location**
  The path where the workgroup files will be located. We recommend you maintain this directory to be within your installation directory. By default, the installation directory is **C:\Inetpub\wwwroot\ProblemTracker**. WMS will create a directory similar to the workgroup name under this location. Example: If the workgroup name is productX, and the location is **C:\Inetpub\wwwroot\ProblemTracker**, then WMS will create the following directory **C:\Inetpub\wwwroot\ProblemTracker\productX** and create workgroup files under this directory.

- **Template**
  Select the template type that corresponds to the environment where ProblemTracker will be used. Each template comes with a basic set of fields and workflow steps modeled for the environment where it will be used. The following templates are available:
  - **Software Development**
    The Software Development template is intended for a code development process. An explanation is available in the Software Development template section of the Administration Help Guide.

  - **Web Site Development**
    The Web Site Development template is intended for a web site development process. An explanation is available in the Web Site Development template section of the Administration Help Guide.

  - **Knowledge Base**
    The Knowledge Base template is intended for the process of publishing articles to a searchable Knowledge Base available to external users. An explanation is available in the Knowledge Base template section of the Administration Help Guide.

- **Help Desk**
  The Help Desk template is modeled for a process where internal users are supported by a Help Desk. An explanation is available in the Help Desk template section of the Administration Help Guide.

- **Support**
  The Support template is geared for a process where external users are supported by a Customer Support team. An explanation is available in the Support template section of the Administration Help Guide.

- **Database Type**
  Select the database type for this workgroup from the pulldown menu options. Access, SQL Server, and Oracle database types are supported. If you are adding a workgroup using Oracle as your database type, before adding a new workgroup please perform the procedure outlined in the Using Oracle 8i (or later) Database Help section. Once you have completed these steps, return to this section to create a new workgroup using Oracle as the database type.

- **Web Site**
  Select the web site where the workgroup should be installed.

- **Require SSL**
  Check the box for this option if you have configured SSL (Secure Socket Layer) on the web site selected above. Please ensure you have entered a valid Server Certificate on your web server in order to apply the Secure Communications feature to your workgroup. Enabling this option will require your users to use **https://** instead of **http://** when browsing to this workgroup.

- **Host Name or IP Address**
  Select the radio button to specify either Host Name or IP Address that corresponds to the web site selected for the workgroup. This information will be used to configure the URL used to access this workgroup.

- **Port Number**
  If applicable, enter the port number associated with the web site you selected above. This information will be used to configure the URL for this workgroup.

- **Comment**
  This field can be used to add any information to describe the new workgroup.

The following fields are Internationalization settings. Please consider the following information when making your selection for these fields. Once you have added records to your ProblemTracker database, you will not be able to change the character set selection. When making your selection, also consider what languages you will need to support in the future.

1. **Character Set**
   ISO-8859-1, Windows-1252, and UTF-8 are the character sets that are supported by ProblemTracker.

- **ISO-8859-1** (also known as Latin1) is a standard single-byte character set that supports Western European languages including: English, Basque, Catalan, Danish, Dutch, Finnish, French, German, Icelandic, Irish, Italian, Norwegian, Portuguese, Scottish, Spanish, and Swedish. The ISO-8859-1 character set is a subset of the Windows-1252 character set. The image below displays the set of characters supported by ISO-8859-1.

	0	1	2	3	4	5	6	7	8	9	A	B	C	D	E	F
2		!	"	#	$	%	&	'	(	)	*	+	,	-	.	/
3	0	1	2	3	4	5	6	7	8	9	:	;	<	=	>	?
4	@	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
5	P	Q	R	S	T	U	V	W	X	Y	Z	[	\	]	^	_
6	`	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o
7	p	q	r	s	t	u	v	w	x	y	z	{	|	}	~	
A		¡	¢	£	¤	¥	¦	§	¨	©	ª	«	¬		®	¯
B	°	±	²	³	´	µ	¶	·	¸	¹	º	»	¼	½	¾	¿
C	À	Á	Â	Ã	Ä	Å	Æ	Ç	È	É	Ê	Ë	Ì	Í	Î	Ï
D	Ð	Ñ	Ò	Ó	Ô	Õ	Ö	×	Ø	Ù	Ú	Û	Ü	Ý	Þ	ß
E	à	á	â	ã	ä	å	æ	ç	è	é	ê	ë	ì	í	î	ï
F	ð	ñ	ò	ó	ô	õ	ö	÷	ø	ù	ú	û	ü	ý	þ	ÿ

- **Windows-1252** is a single-byte character set that supports all of the characters in ISO-8859-1, plus some additional European characters including: the Euro sign, tilde, caron, and per mille. The image below displays the additional characters which are in Windows-1252 (but are not in ISO-8859-1). If you require the use of any of these characters, then you can not use the ISO-8859-1 character set.

€	EURO SIGN
‚	SINGLE LOW-9 QUOTATION MARK
ƒ	LATIN SMALL LETTER F WITH HOOK
„	DOUBLE LOW-9 QUOTATION MARK
…	HORIZONTAL ELLIPSIS
†	DAGGER
‡	DOUBLE DAGGER
ˆ	MODIFIER LETTER CIRCUMFLEX ACCENT
‰	PER MILLE SIGN
Š	LATIN CAPITAL LETTER S WITH CARON
‹	SINGLE LEFT-POINTING ANGLE QUOTATION MARK
Œ	LATIN CAPITAL LIGATURE OE
Ž	LATIN CAPITAL LETTER Z WITH CARON
‘	LEFT SINGLE QUOTATION MARK
’	RIGHT SINGLE QUOTATION MARK
“	LEFT DOUBLE QUOTATION MARK
”	RIGHT DOUBLE QUOTATION MARK
•	BULLET
–	EN DASH
—	EM DASH
˜	SMALL TILDE
™	TRADE MARK SIGN
š	LATIN SMALL LETTER S WITH CARON
›	SINGLE RIGHT-POINTING ANGLE QUOTATION MARK
œ	LATIN SMALL LIGATURE OE
ž	LATIN SMALL LETTER Z WITH CARON
Ÿ	LATIN CAPITAL LETTER Y WITH DIAERESIS

- **UTF-8** supports virtually all available languages. It includes support for all Western European languages mentioned above for ISO-8859-1 and Windows-1252 as well as other languages such as Arabic, Chinese, Czech, Greek, Hebrew, Hindi, Hungarian, Japanese, Korean, Polish, Romanian, Russian, Tamil and many others. UTF-8 is an ASCII compatible encoding method for Unicode (ISO 10646). It is not supported by Internet Information Server (IIS) 4.0 (the Microsoft web server on NT 4.0) and will not be included as an option if you installed ProblemTracker on Windows NT.

Even though UTF-8 supports the widest range of languages, it requires Windows 2000 Server and each user must have all of the necessary fonts installed on their desktop (web browser) machine in order to view all characters. Also, UTF-8 generally uses slightly more processor power at both web server and browser. If you are confident that the workgroup will only require English or another Latin1 language that does not require the special characters in the Windows-1252 character set (e.g. Euro symbol), then you should use ISO-8859-1. If you are using a Latin1 language and require one of the special symbols in Windows-1252, then you should use Windows-1252 as the character set. If you are not using a Latin1 language (or expect to add use of a non-Latin1 language to this workgroup in the future), then you should use UTF-8.

When selecting the character set for your workgroup, you should also consider the users that will be accessing the workgroup. Each user account has a set of profile information that is displayed within each workgroup. Each user account has a character set, which is based on the characters used in the user account's profile information. The User Character Set must be compatible with the workgroup character set. For example, a user account with UTF-8 characters in its profile can only be given access to a workgroup with UTF-8 configured as the workgroup character set.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- As mentioned above, if a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

To view a user's character set, use the Edit a User operation in the License Administration section.

2. **Email Header Encoding**
Email headers must contain only US-ASCII characters. Headers that contain non US-ASCII characters must be encoded so that they contain only US-ASCII characters. This process involves using either **B (Base 64)** or **Q (Quoted-Printable)** to encode certain characters. The **Q** encoding is recommended for use when most of the characters to be encoded are in the ASCII character set; otherwise, the **B** encoding should be used. If you select **Auto**, ProblemTracker will automatically select an encoding option.

3. **Add Multipart Email**
This option determines whether the emails generated by ProblemTracker will contain text or text and HTML within the messages. Selecting **Yes** for this option will allow the emails to contain both text and HTML. For example, if you selected UTF-8 as the character set for a workgroup, email generated by ProblemTracker may also contain UTF-8 characters. If your email client cannot display UTF-8 characters, selecting **Yes** for the Email Add HTML Part option might help. With this option enabled, ProblemTracker will send email with both text and HTML format. If your email client can display HTML format, UTF-8 email can be displayed.

4. **Time Zone**
   This option determines which time zone will be selected for users by default to view the workgroup data. Irrespective of the setting you choose for the default here, each user can select their own time zone setting in the Personal Preferences section. For a list of available time zones in your operating system, please refer to one of the following sections:
   Windows 2003 / XP / 2000 Time Zones
   Windows NT 4.0 Time Zones

5. **Adjustment for Daylight Saving Time**
   This option determines whether the workgroup date is adjusted to observe daylight saving time. If you have selected a time zone that observes daylight saving time, it is recommended that you check the box to enable ProblemTracker to make the appropriate adjustments.

Once you have entered the relevant information to create the new workgroup, click the Continue button.

If you selected SQL Server or Oracle as the database type, you will be prompted to provide additional information about the database:

- **Database Name**
  By default, this will display the name selected as the workgroup name. You can change this in the space provided.

- **Location (Server)**
  Enter the name of the machine where SQL Server or Oracle is located.

- **User Name**
  Enter the user name to be used to connect to SQL Server. It will be "sa" by default. You will not be prompted for user name if you have chosen Oracle.

- **Password**
  Enter the password for the user name specified above to connect to SQL Server. If you are using the login "sa", this will be blank by default. You may need to check with your system administrator if the password has been changed. You will not be prompted for the password if you have chosen Oracle.

- **Physical Path**
  This option is only used when SQL Server is selected as the database type. Enter the location of the database files within SQL Server. You can click on the **Get Data** button to connect to the SQL Server and automatically get the physical path. If the Get Data operation is not successful, check with your system administrator since the path depends on what was chosen during the SQL Server installation, and enter the appropriate path. If the path you entered is not synchronized with the SQL Server installation path, you might get an error while creating the workgroup.

Click on the **Continue** button to proceed with creating the workgroup.

A Component Check will be done to validate the information entered for the new workgroup. If the Component Check is successful, a confirmation of the database information will be shown. If the Component Check is unsuccessful, details about the components that failed will be listed. If you wish to save the settings you entered above to be displayed as the default settings whenever adding future new workgroups, check the box labeled **Save as default settings**. You can click on the **Back** button to make any modifications to the database information. Otherwise, click on the **Create Workgroup** button as the final step to create the workgroup.

If you selected SQL Server or Oracle as the database type, click on the **Initialize Tables** button that appears after the workgroup has been created.

To login to your new workgroup, go back to the Workgroup Management System Home Page, find the name of the workgroup you added, then click on the key icon to the left of the workgroup name. A separate window will be launched with the Login page for your workgroup. Or, you can launch a browser window and enter the following URL to reach your workgroup:

http://*servername*/*workgroupname*/

where ***servername*** is the TCP/IP host name of the machine where you installed ProblemTracker and ***workgroupname*** is the name of the workgroup you created.

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Viewing a Workgroup

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To view a workgroup, click on the **View** button on the Button Bar, select a workgroup from the pulldown menu, then click on the **View** button below the pulldown menu. You can also click on the **View** icon to the left of a workgroup name from the Home Page.

Details of the workgroup will be displayed including general workgroup and database information as well as aliases. To browse to the login page of the workgroup displayed, click on the **Login URL**.

A history of the actions performed on the workgroup will also be displayed.

Editing a Workgroup

To edit a workgroup, click on the **Edit** icon on the Button Bar. Then, select a workgroup to edit from the pulldown menu and click the **Edit** button under the pulldown menu. You can also click on the **Edit** icon to the left of a workgroup name from the Home Page.

The following workgroup settings can be modified:

- **Description**
  Modify the text entered to describe the workgroup

- **Require SSL**
  Enable or disable the option to require SSL (Secure Socket Layer) on the workgroup. Enabling this option (checking the box) requires that a valid Server Certificate has been entered on the web server to apply SSL to this workgroup.

- **Host Name or IP Address**
  Update the Host Name or IP Address used to reach the web site where this workgroup has been created. The information stored in this field is used to configure the URL for this workgroup.

- **Port Number**
  Update the port number used to reach the web site where this workgroup has been created. The information stored in this field is used to configure the URL for this workgroup.

- For SQL Server and Oracle databases, you can also modify the **Database User Name**, and **Database User Password**. Workgroups using Access database will not have this option.

  If you wish to change the User Name, you must enter the User Name, and also enter the same value for User Password and Confirm User Password fields. If you wish to change just the User Password, enter values for the User Password, and Confirm User Password fields.

- **Comment**
  Update the additional information listed for this workgroup

- **History Comment**
  Enter a description of the changes being made to the workgroup settings

After modifying the fields you wish to update, click on the **Save** button.

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Deleting a Workgroup

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To delete a workgroup, click on the **Delete** button on the Button Bar, select a workgroup name from the pulldown menu, then click on the **Delete** button below the pulldown menu. You can also click on the **Delete** icon to the left of the workgroup name from the Home Page.

Details of the workgroup to be deleted will be displayed. If you wish to also delete the database as well as the workgroup, check the box at the bottom labeled **Also delete the workgroup database**. If you wish to also delete the database and the database is a SQL Server database, wait one minute before proceeding with the delete process to allow the connection to the database to shutdown. Click the **Delete Workgroup** button to proceed with deleting the workgroup. Click **OK** to confirm that the workgroup should be deleted. A message will appear to confirm that the workgroup was deleted successfully.

If there are any active users using this ProblemTracker workgroup, WMS will not allow the workgroup to be deleted and will display a warning message. To successfully delete a workgroup, all active users should be logged off from the ProblemTracker workgroup. You can logoff users with the Logoff User Sessions operation available in the Block and Unblock Workgroups section.

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Managing Aliases

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You may wish to create an alias for a workgroup in order to re-direct a URL to one of your workgroups as an alternative to using the default URL for ProblemTracker.

For example, instead of using the default URL

http://servername/workgroup/ptlogin.asp or **http://servername/workgroup**,

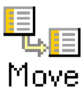
instead you would like to use the URL

http://servername/product1. To do this, add "product1" as an alias for this workgroup.

To create an alias, click on the **Alias** icon on the Button Bar, select a workgroup from the pulldown menu, then click on the **Alias** button below the pulldown menu.

If there are any current aliases for the workgroup, they will be displayed in the **Alias List** at the top of the Workgroup Aliases page. Type in the new alias in the field labeled **Create New Alias**. The alias cannot contain the symbols "/", "\", "<" or ">". Click on the **Create** button at the right to save the new alias. The alias will then appear on the **Alias List**.

To delete an alias on the **Alias List**, select the radio button to the left of the alias, then click on the **Delete** button.



To move a workgroup, click on the **Move** button on the Button Bar. Select a workgroup from the pulldown menu, select one of the following move operations described below, then click on the **Continue** button.

If you have manually applied any custom security to your workgroups (such as file system permissions or IIS application settings), you will need to re-apply these changes to this workgroup after it using one of the move operations described below. A Web Server Security Overview can be found in the Installation Help Guide.

Move Workgroups within the same Web Server machine

This operation should be used if you want to change the physical location of the workgroup within the web server machine where the workgroup is currently located:

1. Login to the Workgroup Management System as Admin
2. Click on the **Move** icon
3. Select a workgroup from the pulldown menu, select the option **Move Workgroups within the same web server machine**, then click on the **Continue** button
4. The workgroup name, location, and web site will be displayed in the **Current Configuration** section.
5. Enter the path of the new location into the **Location** field and / or select a different **Web Site** in the New Configuration section.
6. Enter the **Host Name** or **IP Address** and the **Port Number** that corresponds to the web site where this workgroup will be located.
7. Enter a **History Comment** to describe the change you are making.
8. Click on the **Continue** button to proceed.
9. A confirmation page will be displayed. Click the **Back** button to make any necessary changes to the location and / or web site. Otherwise, click on the **Move Workgroup** button, then click on the **OK** button to complete the move operation.

Move Database from one machine to another

This option allows you to move the database to another machine while still keeping the workgroup's web pages in the same location. This operation cannot be performed for Access databases:

1. Login to the Workgroup Management System as Admin
2. Click on the **Move** icon
3. Select a workgroup from the pulldown menu, select the option **Move Database from one machine to another**, then click on the **Continue** button
4. The workgroup name, database type, database name, and database location will be displayed in the **Current Configuration** section.
5. Enter new values for any of the following fields in the **New Configuration** section: Database Name,

Location (Server Name where the database is located), Database User Name, Database Password, Physical Path (for SQL Server only).
6. You must add information in the **History Comment** field to proceed.
7. Click on the **Continue** button.
8. A confirmation page will be displayed. Click the **Back** button to make any necessary changes to the location and / or web site. Otherwise, click on the **Move Workgroup** button, then click on the **OK** button to complete the move operation.

After the workgroup files have been moved, the database needs to be moved into the new machine using the import / export tool for your database type. The latest procedure can be found in the Frequently Asked Questions section of our web site at:

http://www.problemtracker.com/pt_faq_howdoi4x.htm#SQLmove4x

Move / Populate Workgroup based on the PTAdmin Database

This option allows you to move all of the workgroups and settings in your ptadmin database to another machine. For example, if you need to move your entire ProblemTracker to a new machine, you can move your Workgroup Management System information to the new machine without having to re-enter information.

Complete the following steps before selecting the option to move / populate workgroup based on the ptadmin database:

1. Install ProblemTracker on the new server machine. When prompted during the installation, do not choose to install the evaluation workgroup called **pteval**.
2. Copy your ptadmin database from your old server to the new server. The ptadmin database can be found in your installation directory. By default, the path is **C:\Inetpub\wwwroot\ProblemTracker\ptadmin\Database\ptadmin.mdb**, where C:\Inetpub\wwwroot\ProblemTracker is the installation directory.
3. Copy your user management database from your old server to the new server. The user management database (ptcommon.mdb) can be found in your installation directory. Be default, this is located at **C:\Inetpub\wwwroot\ProblemTracker\ptcommon\Database\ptcommon.mdb**, where C:\Inetpub\wwwroot\ProblemTracker is the installation directory.
4. Click on the **Move** icon on the Button Bar. Select a workgroup from the pulldown menu, select the option **Move / populate workgroup based on the Workgroup Management System database**, then click on the **Continue** button.
5. Existing properties of the selected workgroup will be displayed in the **Current Configuration** section. You have an option to change the workgroup location, virtual web site, host name or IP address and the port number for this workgroup on the new server. If you don't need to change anything accept the default values. Click on the **Continue** button.
6. New properties for this workgroup will be displayed in the **New Configuration** section. Click on the **Move Workgroup** button to complete the process.
7. Copy the **Attachments** folder from the old server to the new server for this workgroup. The Attachments folder can be found in the installation directory. By default, the path is **C:\Inetpub\wwwroot\ProblemTracker\workgroup\Attachments** where workgroup is pteval, ptdev, etc.

Important Note:
For workgroups with an **Access** database, you will need to complete one more additional step:

- Copy the workgroup database file **bugtrack.mdb** from the old server to the new server. The workgroup database can be found in your installation directory. By default, the path is **C:\Inetpub\wwwroot\ProblemTracker\workgroup\Database\bugtrack.mdb** where workgroup is pteval, ptdev, etc. You can also find the database location by viewing the workgroup information on the old server.

8. Repeat the above steps for each of the workgroup that you wish to move to the new server.

NetResults ProblemTracker

Migrating a Workgroup

Help Topics | << | >>

Migrate

The following options are available for migrating a workgroup to a different database type:

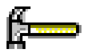
Option	Current Database Type	New Database Type
1	Access	SQL Server
2	Access	Oracle
3	SQL Server	Oracle
4	Oracle	SQL Server

For a detailed procedure to perform any of these migration options, please review the following entry in our Frequently Asked Questions section of the web site:

http://www.problemtracker.com/pt_faq_howdoi4x.htm#dataimpexp

NetResults ProblemTracker

Repairing a Workgroup



A repair operation is available to correct certain aspects of a workgroup that may have been manually configured or damaged. The repair operation can be used to install a fresh set of web pages for the workgroup, delete and re-create the web server settings for the workgroup, and reset the related file system permissions. The repair operation is not available for a workgroup until it has been upgraded to the latest version. The latest version is the version that matches that of the Workgroup Management System. The Workgroup Management System version can be found in the upper right corner of the Workgroup Management System Home Page.

The options available to repair a workgroup are:

- **Copy Web Files**
  This option will copy a fresh set of web pages into the workgroup's directory. By default, the workgroup's directory can be found at **C:\Inetpub\wwwroot\ProblemTracker\workgroup** where workgroup is the name of the workgroup.

  If you have customized the workgroup's login page you will need to re-apply the changes after performing a repair with this option selected.

- **Reset File Permissions**
  This option will reset the file system permissions for the workgroup to the defaults that were set when the workgroup was created.

  If you have manually applied your own custom file system permissions to your workgroups, you will need to re-apply these changes after running the repair operation with this option selected. A Web Server Security Overview can be found in the Installation Help Guide.

- **Repair IIS Application Settings**
  This option will delete and recreate the IIS settings related to this workgroup.

  If you have manually applied any custom security in IIS for your workgroups, you will need to re-apply these changes to this workgroup after running the repair operation. A Web Server Security Overview can be found in the Installation Help Guide.

To **repair** a workgroup:

1. Login to the Workgroup Management System
2. Click on the **Repair** icon in the Button Bar. Or, you can also click on the **Repair** icon to the left of the workgroup name on the Home Page.
3. If you clicked on the Repair icon in the button bar, you will be prompted to select a workgroup from the pulldown menu, then click on the **Repair** button below the pulldown menu.

4. A confirmation page will appear. Click the **Back** button to select another workgroup to be repaired. Check the boxes that correspond to the areas you wish to repair. Click on the **Repair Workgroup** button to complete the repair operation.
5. Re-apply the custom login page HTML or settings for the workgroup (such as file system permissions or IIS application settings). A Web Server Security Overview can be found in the Installation Help Guide.

NetResults ProblemTracker

Administering Users

The User accounts that access the Workgroup Management System are administered in this section.

To change the password for a user account:

1. Login to the Workgroup Management System
2. Click on the **Admin** icon
3. Select the option **WMS User Administration**, then click on the **Continue** button
4. Type in the current password, the new password, then confirm the new password in the corresponding fields. Click **Save** to complete the password change.

NetResults ProblemTracker

Synchronize Anonymous Account

Help Topics | << | >>

When changes are made to ***PUSR4hostname***, the ProblemTracker Anonymous User account, it may be necessary to synchronize this user's information stored in the Workgroup Management System.

The password of the PUSR4*hostname* can be synchronized with the current password of PUSR4*hostname* account in Windows User Manager.

If you would like to have a different password for PUSR4*hostname* account other than the one supplied by WMS, then first change the password for this user in the Windows User Manager and then synchronize the password in WMS by using this function.

Note: Using this function will not change the actual password for PUSR4*hostname* account in the Windows User Manager. This will update only the password stored in WMS.

After changing the password in WMS, this new password will be used while adding, repairing and upgrading workgroups. If you have disabled Password Synchronization in IIS Anonymous User Configuration (by default it is enabled), then to complete the synchronization process, you must repair each workgroup by using the 'Repair' functionality in WMS.

To synchronize PUSR4*hostname*'s password in WMS:

1. Login to the Workgroup Management System
2. Click on the **Admin** icon
3. Select the option called **Synchronize ProblemTracker Anonymous Account**
4. Click on the **Continue** button
5. Type in the current password (the password saved for this user in the local Windows User Manager) and confirm the password
6. Click **Save** to submit the change of password. You will get a confirmation message when the password is synchronized (updated) in WMS.

NetResults ProblemTracker

Viewing Global Workgroup Information

Help Topics << >>

To view common parameters used by the Workgroup Management System:

1. Login to the Workgroup Management System
2. Click on the **Admin** icon in the Button Bar
3. Select the option called **View Common Parameters used by Workgroup Management System**
4. Click on the **Continue** button

The following information will be displayed:

- WMS Version
- Computer Name
- Program Directory Path
- Program Folder Path
- Web Directory Path
- Web Host Name or IP Address
- Web Server Name and Version
- Web Site where WMS is installed
- Port Number for WMS
- Provider for WMS (default is OLE-DB)
- Character Set for WMS
- General Log Directory Path
- Installation Log Directory Path
- Java Virtual Machine (JVM) used

NetResults ProblemTracker

Editing Global Workgroup Information

Help Topics | << | >>

The options in this section allow you to edit common parameters used by the Workgroup Management System. Currently, the parameters that can be edited are the Oracle ODBC Driver Name, used by workgroups with Oracle configured as the database type, and the Java Virtual Machine type, used to generate email notifications.

Oracle ODBC Driver Name

This parameter is used by workgroups with Oracle selected as the database type. You should only modify this field if you are using Oracle Database 9i or 10g with ProblemTracker or under the advice of NetResults Technical Support. If you are using Oracle Database 9i or 10g with ProblemTracker, find the name of the Oracle Driver listed in the ODBC settings to update the Oracle ODBC Driver Name used by WMS:

1. Go into the ODBC configuration section. In Windows 2000/2003, this can be found in Administrative Tools section. In Windows NT, this can be found in the Control Panel.
2. Click on the Drivers tab.
3. Find the Oracle ODBC Driver. This driver will have Oracle Corporation listed in the Company column and "SQORA32.DLL" listed in the File column. Take note of what is listed in the Name column for this driver.
4. Update the Oracle ODBC Driver Name listed in the Workgroup Management System (WMS):
    1. Login to the Workgroup Management System
    2. Click on the **Admin** icon in the Button Bar
    3. Select the option **Edit Common Parameters used by Workgroup Management System**
    4. Click on the **Continue** button
    5. Enter the driver name as it was listed in the ODBC configuration into the **Oracle ODBC Driver Name** field, then click on the **Save** button
    6. A confirmation page will be displayed
    7. Click on the **OK** button to return to the Admin section

Click here to return to the Using Oracle 8i or later Database section.

Java Virtual Machine

This parameter is displayed only on Windows Server 2003 and Windows 2000 installations. This is not displayed on Windows NT 4.0 installations. You should only modify this field if you wish to change the Java Virtual Machine (JVM) type used to send and receive email notifications or under the advice of NetResults Technical Support. You must have the corresponding JVM installed **before** you change the type selected in this section. Sun JVM is recommended for use with Windows Server 2003 as Microsoft does not ship Microsoft JVM with Windows Server 2003. Either JVM can be used on Windows 2000. Information for download and installing JVM can be found in the Preparation for Installing ProblemTracker section of the Installation Help

Guide.

To change the JVM selected in WMS:

1. Login to the Workgroup Management System
2. Click on the **Admin** icon in the Button Bar
3. Select the option **Edit Common Parameters used by Workgroup Management System**
4. Click on the **Continue** button
5. Select the type in the **Java Virtual Machine (JVM)** pulldown, then click on the **Save** button
6. A confirmation page will be displayed
7. Click on the **OK** button to return to the Admin section

NetResults ProblemTracker

Logging Workgroup Information

Help Topics | << | >>

A log with basic information about a workgroup can be generated for troubleshooting purposes.

To log the workgroup information to a file:

1. Login to the Workgroup Management System
2. Click on the **Admin** icon in the Button Bar
3. Select the option **Log Workgroup Information to a file**
4. Click on the **Continue** button
5. Select a workgroup from the pulldown menu
6. Click on the **Log Info** button
7. Retrieve the file from the pttmp folder in the installation directory. The path will be displayed at the top of the page after the logging operation has been completed. By default, the path to retrieve the file will be

   C:\Inetpub\wwwroot\ProblemTracker\pttmp*workgroup*.txt

   where C:\Inetpub\wwwroot\ProblemTracker is the installation directory and *workgroup* is the name of the workgroup.

The log file (workgroup.txt) will contain the following information about the workgroup.

- Basic database information stored in Workgroup Management System
- Alias information
- Web files/folders
- Permissions on this web files/folders
- IIS web server information
- MTS (Component Services) package information
- Application Pool information (only on Windows 2003)
- IP Address restriction information
- Workgroup database information
- General history information
- Detailed history information

This log file is mainly used for assisting NetResults Technical Support in case there is any problem accessing the workgroup.

NetResults ProblemTracker

Blocking and Unblocking Workgroups

Help Topics << >>

When performing maintenance or making administrative changes to your database, you may find it useful to block the workgroup from user access. There is also a facility for you to logoff any active user sessions prior to blocking a workgroup.

To **block** a workgroup(s):

1. Login to the Workgroup Management System
2. Click on the **Admin icon**.
3. Select the option called **Block / Unblock Workgroups**, then click on the **Continue** button.
4. Each workgroup and its block / unblock status will be listed. Check the box to the left of each workgroup you wish to block. If you wish to select all workgroups, click on the check box at the top of the left column.
5. If you would like users who attempt to browse to a blocked workgroup to see a custom message (rather than the default message listed below), enter that message in the Block Message box. The text you are entering will be treated as raw HTML (so you can include things such as links to other pages). However, please do not include <HTML>, </HTML>, <BODY>, </BODY>, or other HTML header tags as this HTML will be embedded in a web page that already has those tags.
6. Then click on the **Block/Unblock** button.
7. Click **OK** to confirm.
8. The workgroup's status will be updated to **Blocked**.

When new users attempt to login to a blocked workgroup, a message saying **Workgroup Blocked** (along with the custom message you entered, if applicable) will be displayed and users will not be able to login. The workgroup must be unblocked in WMS to allow users to login into the workgroup again. Active users who were using the system when the workgroup was blocked, will get a session expired message and have to login again to use the workgroup.

To **unblock** a workgroup(s):

1. Login to the Workgroup Management System.
2. Click on the **Admin icon**.
3. Select the option called **Block / Unblock Workgroups**, then click on the **Continue** button.
4. Check the box to the left of each workgroup you wish to unblock. If you wish to select all workgroups, click on the check box at the top of the left column.
5. Click on the **Block/Unblock** button.
6. Click **OK** to confirm.
7. The status will be updated to **Active**.

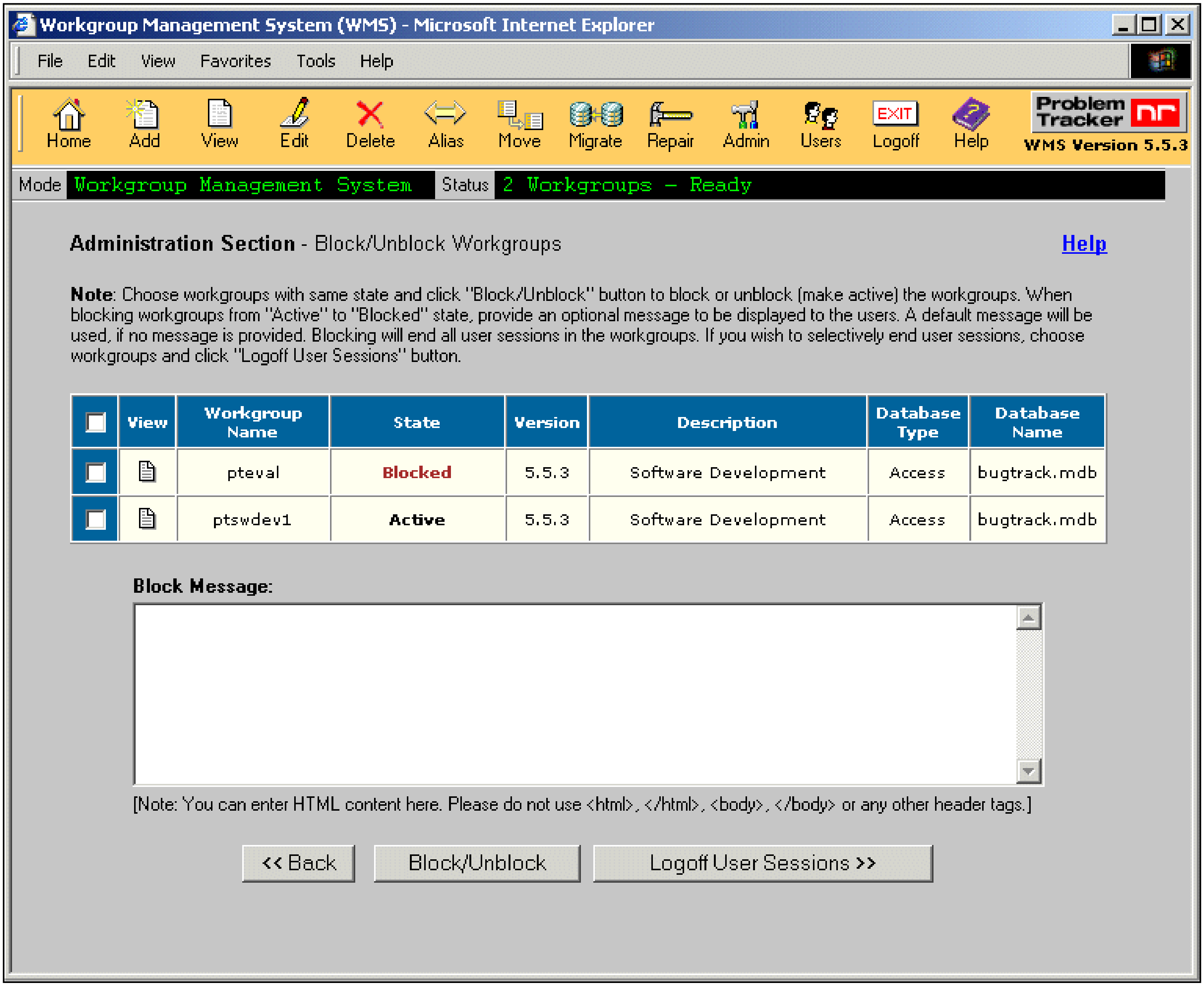
Customize the Block Message

When a workgroup is blocked, users that attempt to login to the blocked workgroup will see information notifying them that the workgroup is blocked and that they cannot login at this time. By default, the message below is displayed:

Workgroup Blocked

This workgroup is currently blocked by your Administrator for maintenance/administrative operations. Please contact your ProblemTracker Administrator to use this workgroup or try again after few minutes.

If you wish to customize the message that users see when a workgroup is blocked, make sure that you enter the custom message before you click the Block button. See the instructions on how to block a workgroup above for information on where to enter the custom message.



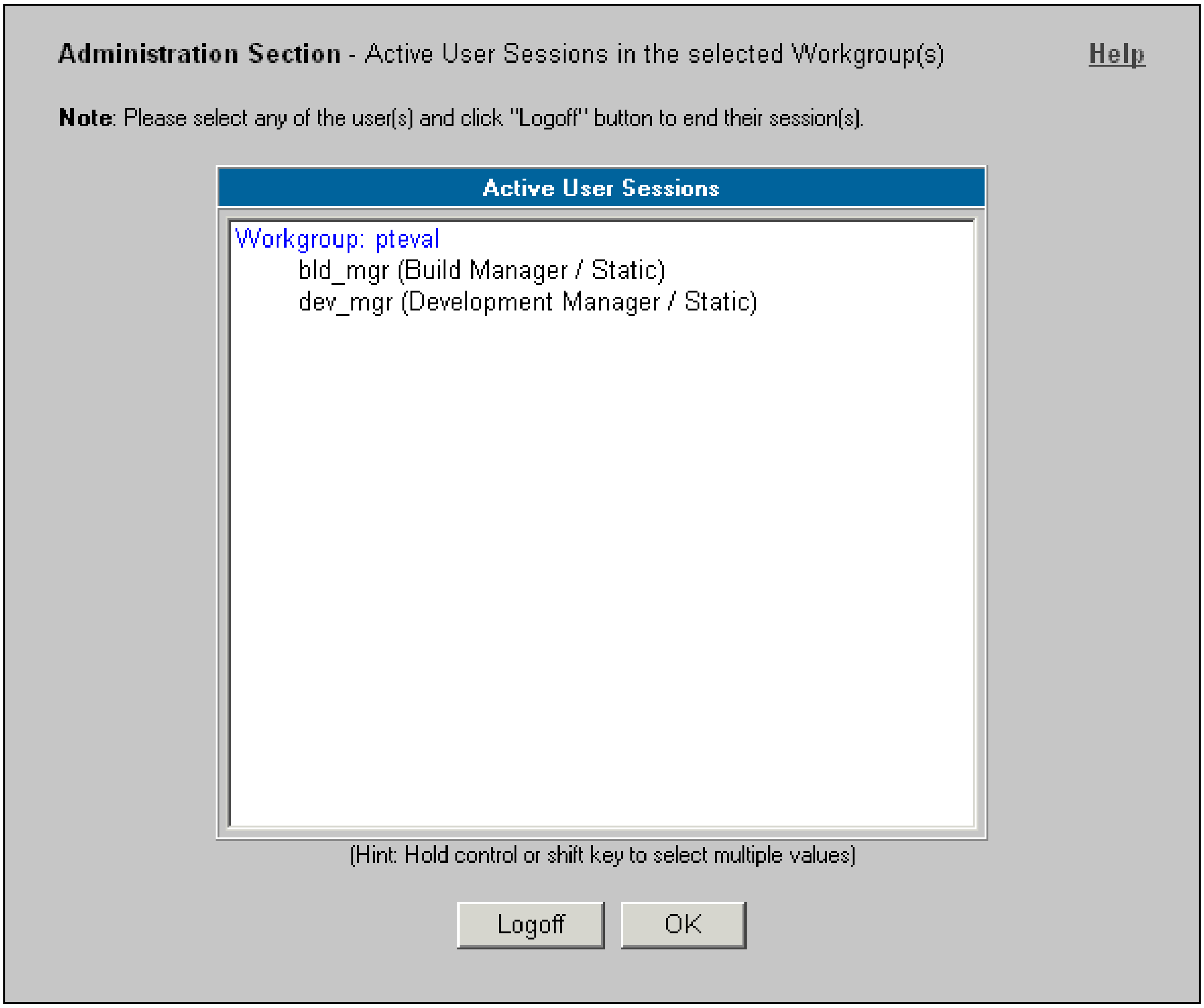
Logging Off User Sessions

You may wish to see whether there are users logged into a workgroup before blocking access to the workgroup using the **Block** operation.

To see a list of active user sessions for a workgroup:

1. Login to the Workgroup Management System.
2. Click on the **Admin** icon.
3. Select the option called **Block / Unblock Workgroups**, then click on the **Continue** button.
4. Check the box on the left of each workgroup for which you wish to see the list of active user sessions, then click on the **Logoff User Sessions** button at the bottom of the page.
5. A list of all active sessions will be displayed. The user name, full name, and license type will be displayed for each session. To end a session by logging off a user, click on the user session to highlight it, then click on the **Logoff** button. By holding down the **CTRL** or **SHIFT** key on your keyboard, you can select multiple user sessions before clicking on the **Logoff** button. You will be prompted with a popup box to confirm the logoff operation. Click **OK** on the popup to end the selected users' sessions.
6. Click on the **OK** button on the bottom of the page to return to the Block / Unblock Workgroups section.

The figure below shows an example of the User Sessions list.


Administration Section - Active User Sessions in the selected Workgroup(s)
Help
Note: Please select any of the user(s) and click "Logoff" button to end their session(s).
Active User Sessions
Workgroup: pteval
bld_mgr (Build Manager / Static)
dev_mgr (Development Manager / Static)
(Hint: Hold control or shift key to select multiple values)
Logoff
OK

NetResults ProblemTracker

Managing Web Server Security

Help Topics | << | >>

ProblemTracker does not automatically configure the web server security to restrict the Workgroup Management System to only local access. This can be achieved by directly configuring the IIS settings. Details on enabling or disabling local or remote access via IIS can be found in the Frequently Asked Questions section of our web site at:

http://www.problemtracker.com/pt_faq_howdoi4x.htm#wmssecurity

NetResults ProblemTracker

Workgroup Database Operations

Help Topics | << | >>

The following options are available for each workgroup in the Workgroup Database Operations section. With the exception of the **Export Tables** option, each of these options may result in **permanent data loss** and should only be used under the guidance of NetResults Technical Support or Professional Services:

To access the Workgroup Database Operations for a particular workgroup:

1. Login to the Workgroup Management System
2. Click on the **Workgroup Database Tools** icon to the left of the workgroup name on the Workgroup Management System Home Page.

   Optionally, you can get to the Workgroup Database Operations page by clicking on the **Admin** icon, selecting the option Manage Workgroup Database Operations, then clicking on the **Continue** button.

3. Select the radio button to the left of the option you wish to use (each is described in detail below), then click on the **Continue** button

Export Tables
Allows you to export all of the tables within the database in the form of comma separate text files (CSV). This is useful to create a snapshot of the database at any point in time, or to generate data in a format usable by third party utilities. The export operation exports the entire contents of the database to comma separate text files (CSV). The files are written to a subdirectory named **Importer\ProblemTracker\Export\Data** below the workgroup's installation directory. By default, the workgroup's installation directory can be found at **C:\Inetpub\wwwroot\ProblemTracker\workgroup** where workgroup is the name of the workgroup. Thus, if using the default installation directory the exported files can be found at **C:\Inetpub\wwwroot\ProblemTracker\workgroup\Importer\ProblemTracker\Export\Data** One file is generated for each table.

Initialize Tables
This operation creates the necessary database tables and populates the database with the initial data. This operation is typically run after using the Add Workgroup operation to add a SQL Server database rather than from this page.

Create Tables
This operation creates the necessary database tables without initializing them (empty tables). This function is typically used after performing a Migrate operation rather than from this page.

Delete Tables
This operation completely deletes **all** data (records, configuration settings, etc.) and tables from the database. This operation should not be used without the supervision of NetResults Technical Support.

Import Tables

Allows you to import an entire database in the form of comma separated text files (CSV). Due to data integrity issues spanning multiple tables, this feature **should not be used without the supervision of NetResults Technical Support or Professional Services**. Doing so will most likely result in a non-functional database (even though it may appear to work for a while) and is a violation of your license agreement if done without the supervision of NetResults Technical support or Professional Services.

Upgrade Data Only
This operation upgrades the database from a previous version of ProblemTracker to the current version. This operation will only upgrade the database. To upgrade the workgroup files, choose the relevant upgrade option in the WMS Admin section (by clicking on the Admin icon in the button bar of WMS).

Upgrade Users Only
This operation upgrades the user accounts in the workgroup to the latest version of ProblemTracker and adds them to the WMS User database. This operation will only upgrade the user accounts. If you need to upgrade the entire workgroup (the web pages, database, etc.), please go to the WMS Admin section and choose the relevant upgrade option (by clicking on the Admin icon in the button bar of WMS).

NetResults ProblemTracker

Upgrading a Workgroup from Version 3.x to the Latest Version

Before attempting to upgrade a workgroup from a version in the 3.x series to the latest version, it is strongly recommended that you make a backup of your database and attachments. It is also recommended that you test the latest version with a copy of your Version 3 workgroup data and examine the changes before you uninstall your Version 3 installation.

In addition, if you have manually applied any custom security to your Version 3 workgroups (such as file system permissions or IIS application settings), you will need to re-apply these changes to this workgroup after it is upgraded to the latest version. A Web Server Security Overview can be found in the Installation Help Guide.

It is recommended that you enter the relevant license keys prior to upgrading your workgroups. If the users in the workgroup you are upgrading are of a license type that does not correspond to your license keys, your users may be blocked from accessing ProblemTracker until you update the license types or enter the license key(s) so the user information corresponds with information entered into the License Manager. For example, if you are upgrading a workgroup that contains users with license type set to "Floating", but you do not have a "Floating" license key entered for the latest version, your users will not be able to login to ProblemTracker until you enter your Floating License Key into the License Manager. For information on changing the license type of a user, please use the Edit a User operation after you have successfully upgraded the workgroup. For information on entering your license key information, review the Alias feature.

Click on the **Continue** button to proceed with the upgrade process.

A confirmation screen listing information for both the current workgroup and the new workgroup will be displayed. Click on the **Back** button to make any necessary changes. Otherwise, click on the **Upgrade Workgroup** button to complete the Upgrade operation. Click **OK** to confirm. A message confirming that the workgroup files have been successfully upgraded will be displayed. The next step is to upgrade the database, click on the **Continue** button to upgrade the database to the latest version.

On the next page, your workgroup information will be displayed. In addition, you will be prompted to select additional time zone settings for this workgroup. These time zone settings can be different from the time zone you selected for the ProblemTracker server machine during the installation process. For a list of available time zones in your operating system, please refer to one of the following sections:
Windows 2003 / XP / 2000 Time Zones
Windows NT 4.0 Time Zones

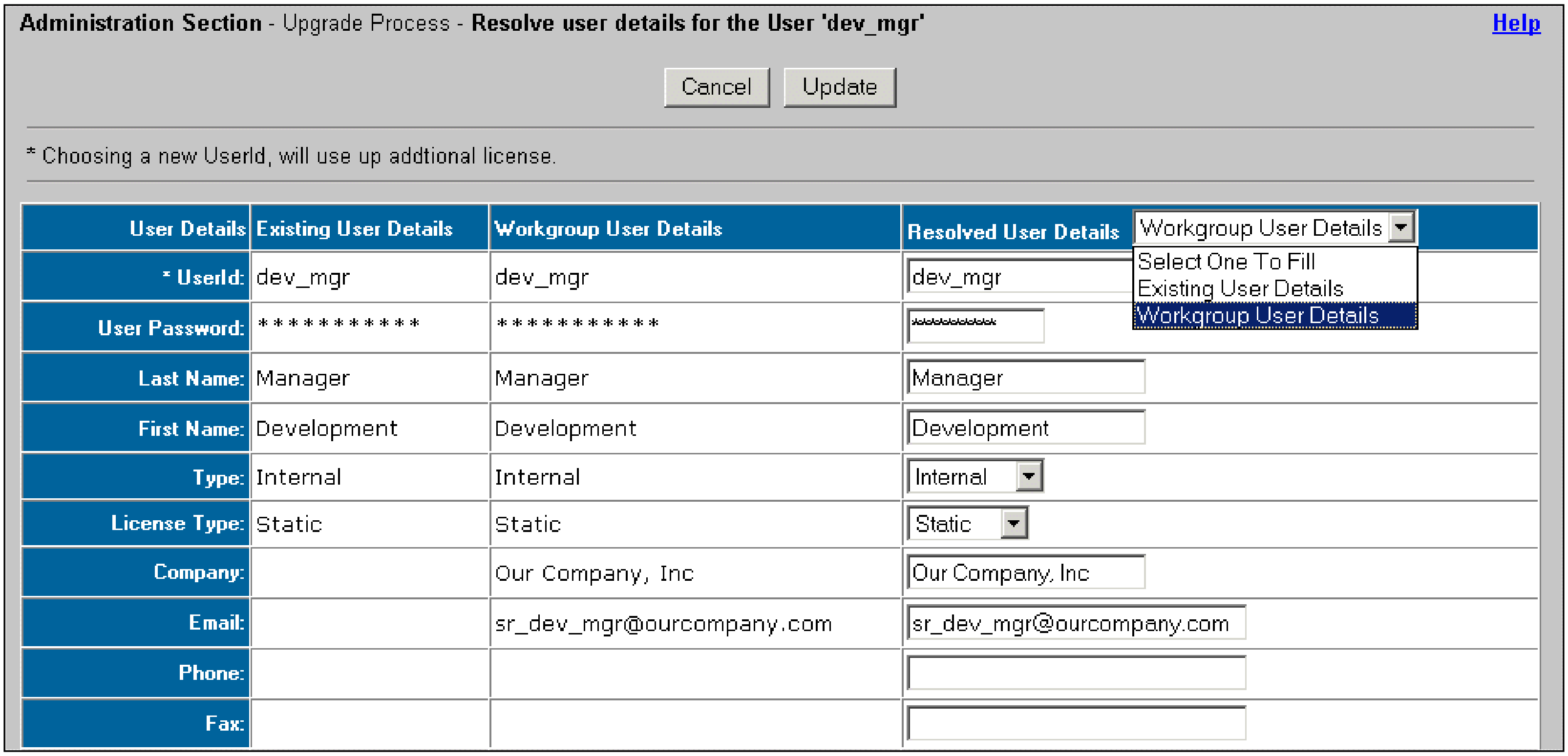
A time zone and whether to adjust for daylight saving time must be specified for the following areas of the workgroup:

- **General Preferences Data**
  The time zone selected here will be the default time zone for users in this workgroup. Users can change this setting at a later time using the Personal Preferences page. This setting will also determine the time zone setting listed in the email notification messages generated from this workgroup.
- **Existing Records and Saved Queries Data**
  The time zone selected here will be the time zone applied to any records and saved queries that currently exist in the workgroup.
- **Existing History Data**
  The time zone selected here will be the time zone applied to any history data that currently exists in the workgroup.

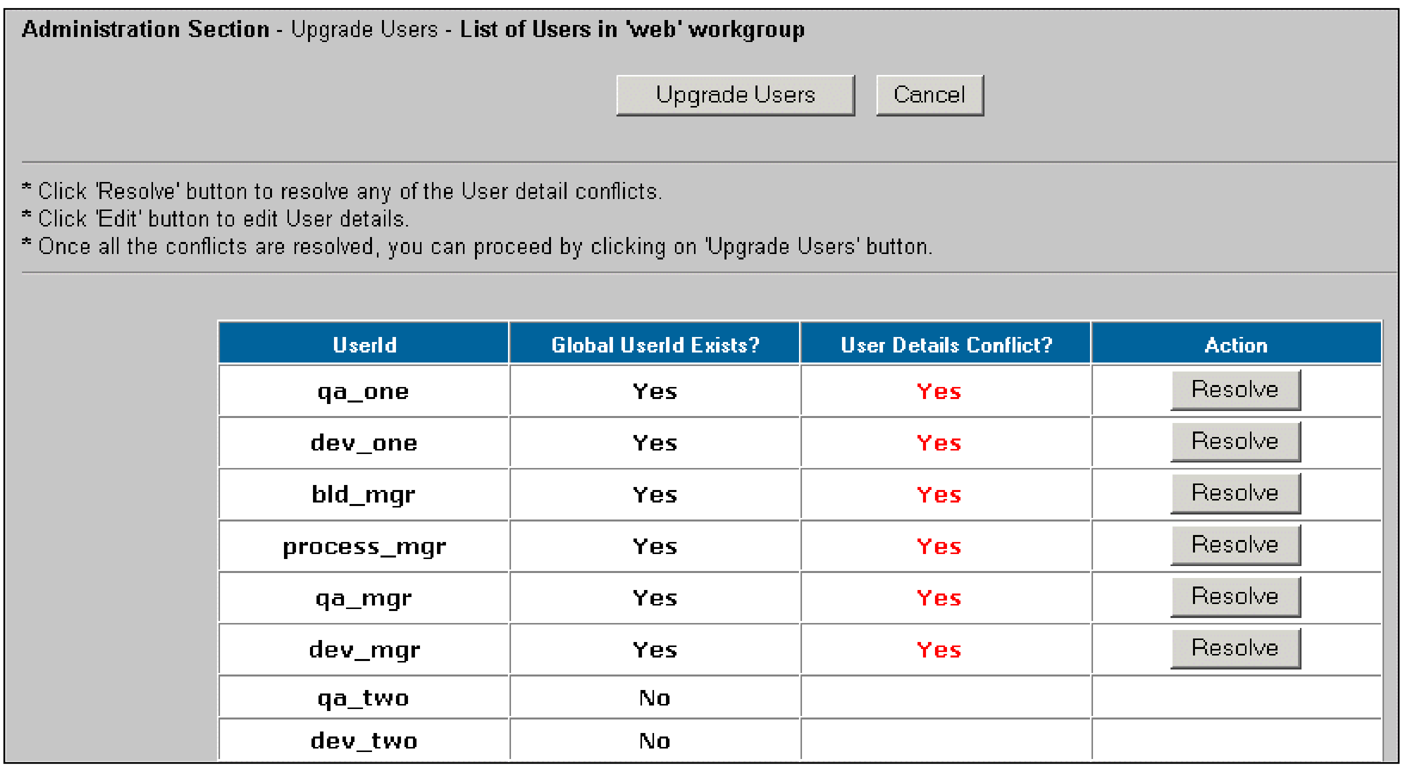
For the workgroup time zone settings listed above, if you have selected a time zone where daylight saving time is observed, it is recommended that you check the box to adjust for daylight saving time.

Once the time zone settings have been specified, click on the **Upgrade Data** button and click **OK** to proceed with upgrading the database. A confirmation message will be displayed when the database has been successfully upgraded. You will be prompted to upgrade your users. In the latest version, users for all workgroups are added and maintained in the License Administration section. When upgrading a workgroup from Version 3.x to the latest version, each user must be upgraded so that the user account can be maintained using the License Administration section. Click on the **Upgrade Users** button to proceed.

If there are conflicts present in your user accounts, you will be prompted to resolve these conflicts before you can proceed with upgrading your users. A user conflict can occur if you have a user id present in multiple workgroups with different profile information. For example, if you have a user account called dev_mgr which is present in 2 workgroups, but this user account has a different Name and Email Address in each workgroup (as shown in the image below). You will need to choose which information will be associated with this user for both workgroups.



After clicking on the **Upgrade Users** button, if there any user conflicts, a page similar to the image below will be displayed.



Users with "Yes" displayed in the **User Details Conflict?** column need to be resolved before you can continue with the upgrade. Click on the **Resolve** button in the **Action** column for each user id to resolve the conflict.

On the next page, details of the user conflict will be displayed. The first column **Existing User Details** shows the user profile information already present for this user account in the License Administration section (this information could be present if you already upgraded another workgroup that contained a user account with the same user id). The second column **Workgroup User Details** contains the user profile information for this user id present in the workgroup you are attempting to upgrade.

To **resolve** the user conflict:

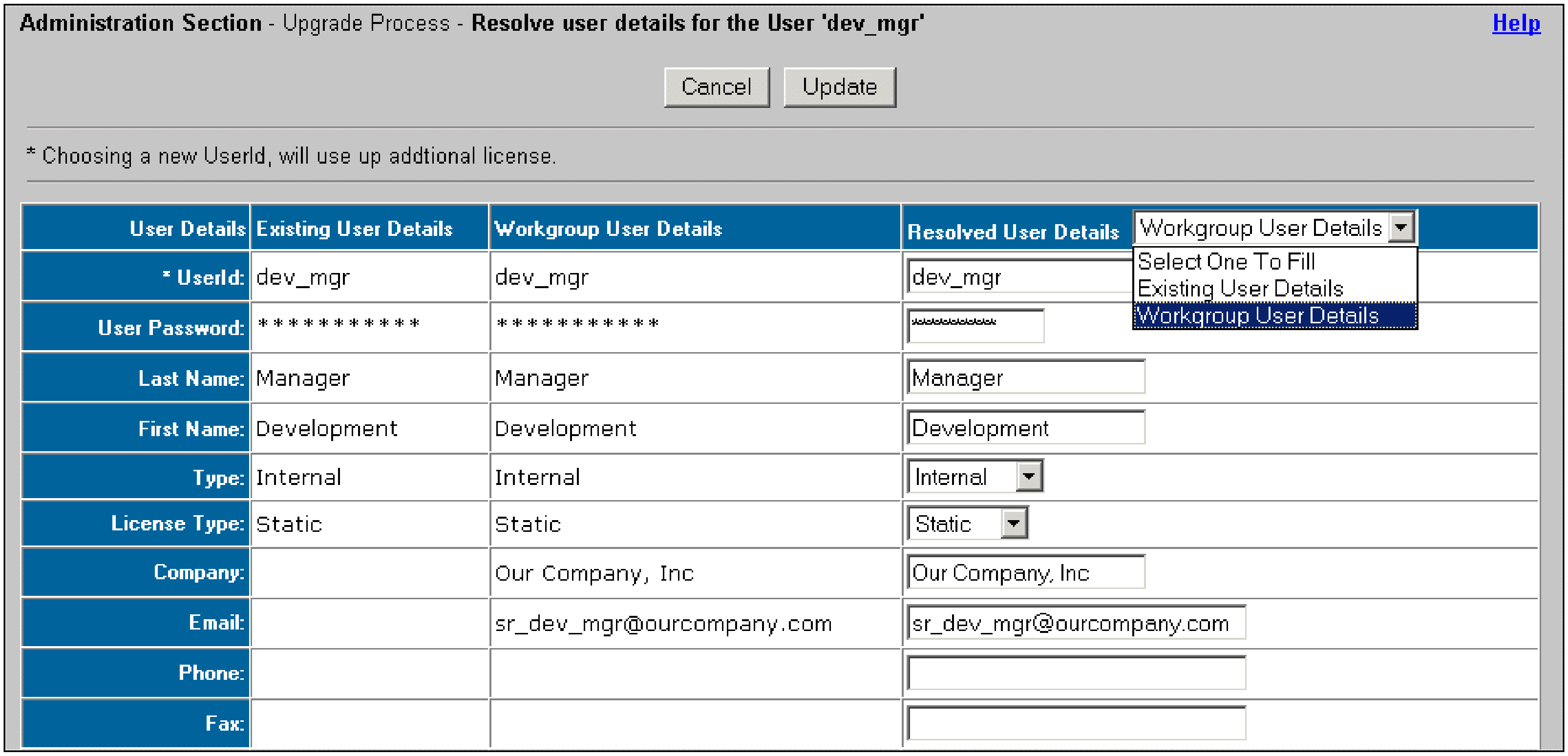
- You can either select the user profile information present in one of the columns (by selecting either "Existing User Details" or "Workgroup User Details" in the pulldown at the top of the "Resolved User Details" column). Click on the **Update** button to proceed.

OR

- You can select the user profile information present in one of the columns (by selecting either "Existing User Details" or "Workgroup User Details" in the pulldown at the top of the "Resolved User Details" column), then change any of the information you would like to save in the user's profile. Choosing this option will result in the user account being saved with the profile information entered in the "Resolved User Details" column. Click on the **Update** button to proceed.

OR

- You can create a new user account to resolve the conflict. To choose this option, select the user profile information present in one of the columns (by selecting either "Existing User Details" or "Workgroup User Details" in the pulldown at the top of the "Resolved User Details" column), then change the user id in the "Resolved User Details" column to be different from the user id displayed in the other columns. You cannot select a user id that is already in use by another workgroup or a user id that is the same as a default user (such as dev_one, dev_mgr, process_mgr, etc.). You may also change any other user profile information in the "Resolved User Details" column, then click on the **Update** button to create this new user account. This will resolve the user conflict and the existing user account already present in the Workgroup Management System (displayed in the "Existing User Details" column) will be preserved. This new user account will be counted toward the license limits for the keys you have entered in the ProblemTracker License Manager. Once you have renamed the user id and click on the **Update** button, you will not have another opportunity to change this user's profile information until after the "Upgrade Users" process is complete. After the users have been upgraded, you can use the Edit User option in the License Administration section to make changes to this user.



Administration Section - Upgrade Process - **Resolve user details for the User 'dev_mgr'** **Help**

Cancel Update

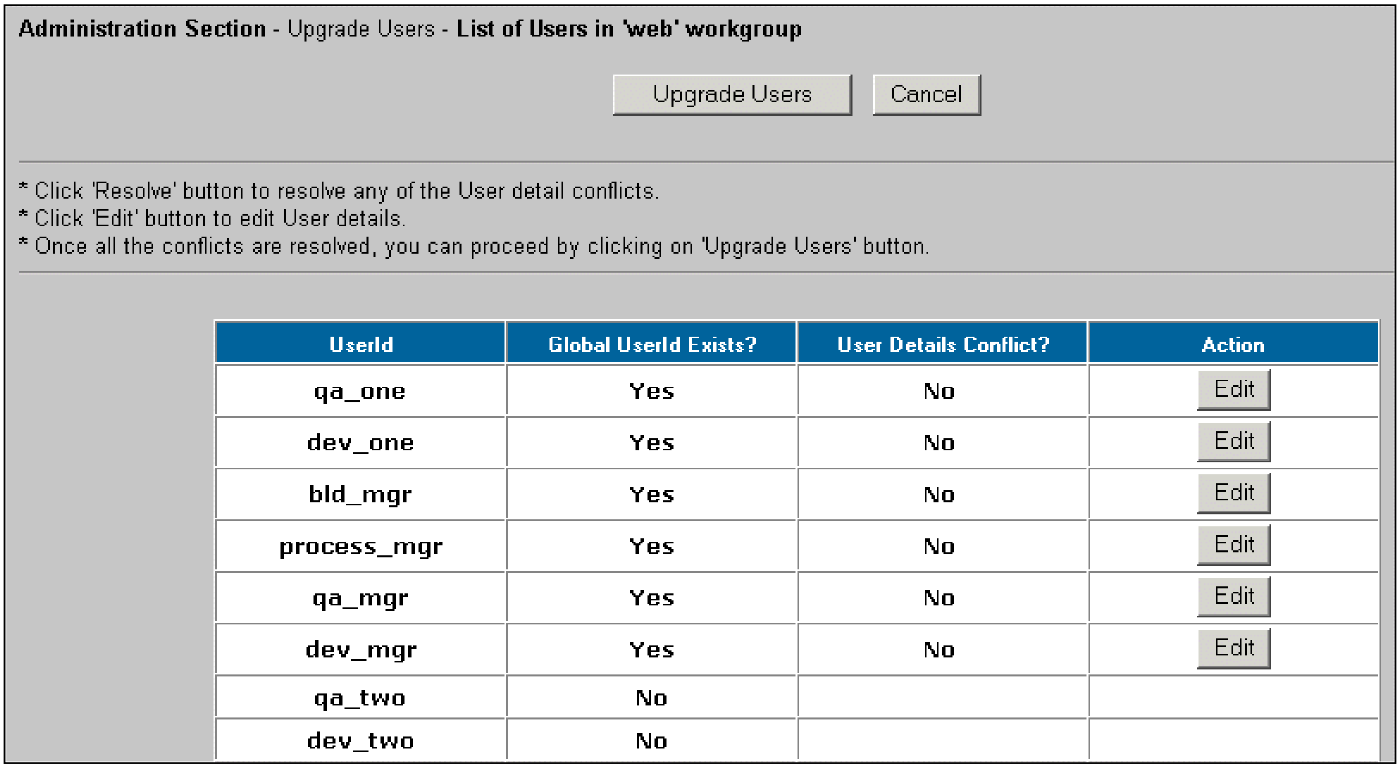
* Choosing a new UserId, will use up addtional license.

User Details	Existing User Details	Workgroup User Details	Resolved User Details [Workgroup User Details ▾: Select One To Fill / Existing User Details / Workgroup User Details]
* UserId:	dev_mgr	dev_mgr	dev_mgr
User Password:	***********	***********	**********
Last Name:	Manager	Manager	Manager
First Name:	Development	Development	Development
Type:	Internal	Internal	Internal
License Type:	Static	Static	Static
Company:		Our Company, Inc	Our Company, Inc
Email:		sr_dev_mgr@ourcompany.com	sr_dev_mgr@ourcompany.com
Phone:			
Fax:			

After making your selection and / or entering the user details in the "Resolved User Details" column, click on the **Update** button. Click on the **Resolve** button for another user to continue resolving the conflicts.

Users with "No" displayed in the **User Details Conflict?** column do not have a conflict present. If you wish to modify the profile information for a user which had a conflict resolved, click on the **Edit** button displayed in the "Action" column for the user account, modify the profile information in the **Resolved User Details** column, then click **Update** to save your changes.

Once all users have "No" listed in the "User Details Conflict?" column and there are no longer any "Resolve" buttons in the "Action" column (as shown in the image below), you can proceed with the upgrade process by clicking on the **Upgrade Users** button. A confirmation will be displayed when the user upgrade process is complete.



Click on the **Home** icon to return to the Workgroup Management System Home Page. Your upgraded workgroup will now be displayed on the list of workgroups on the Home Page. To login to your upgraded workgroup, click on the key icon to the left of the name of your upgraded workgroup. A separate window will be launched with the workgroup's login page.

Editing a User Profile during the Upgrade Users operation

When the **Edit** button is present in the Action column during the process of upgrading users, you can click on the Edit button to make changes to a user's profile. The Edit button will not be displayed for any users which did not have a user conflict. You can only edit users without conflicts after the "Upgrade Users" operation is complete by using the Edit User option in the License Administration section. After clicking on the **Edit** button in the "Action" column of a user, you can select one of the following options to make changes to the user:

- Select the **Existing Workgroup Details** option in the pulldown at the top of the Resolved User Details column to fill the **Resolved User Details** column with the profile information present in the Existing Workgroup Details column. You can change the information in the Resolved User Details column, then click **Update** to save the changes.

  OR

- Select the **Workgroup User Details** option in the pulldown at the top of the Resolved User Details column to fill the **Resolved User Details** column with the profile information present in the Workgroup User Details column. You can change the information in the Resolved User Details column, then click **Update** to save the changes.

  OR

- Select the **Resolved User Details** option in the pulldown at the top of the Resolved User Details column to fill the Resolved User Details column with the profile information you last saved for this user when you were resolving the conflict (by clicking on the **Resolve** button from the list of conflicts). You can change the information in the Resolved User Details column, then click **Update** to save the changes.

NetResults ProblemTracker

Upgrading a Workgroup from Version 4.x or 5.x to the Latest Version

Help Topics | << | >>

Before attempting to upgrade a workgroup from a version in the 4.x or 5.x series to the latest version, it is strongly recommended that you make a backup of your database.

In addition, if you have manually applied any custom security to your workgroups (such as file system permissions or IIS application settings), you will need to re-apply these changes to this workgroup after it is upgraded to the latest version. A Web Server Security Overview can be found in the Installation Help Guide.

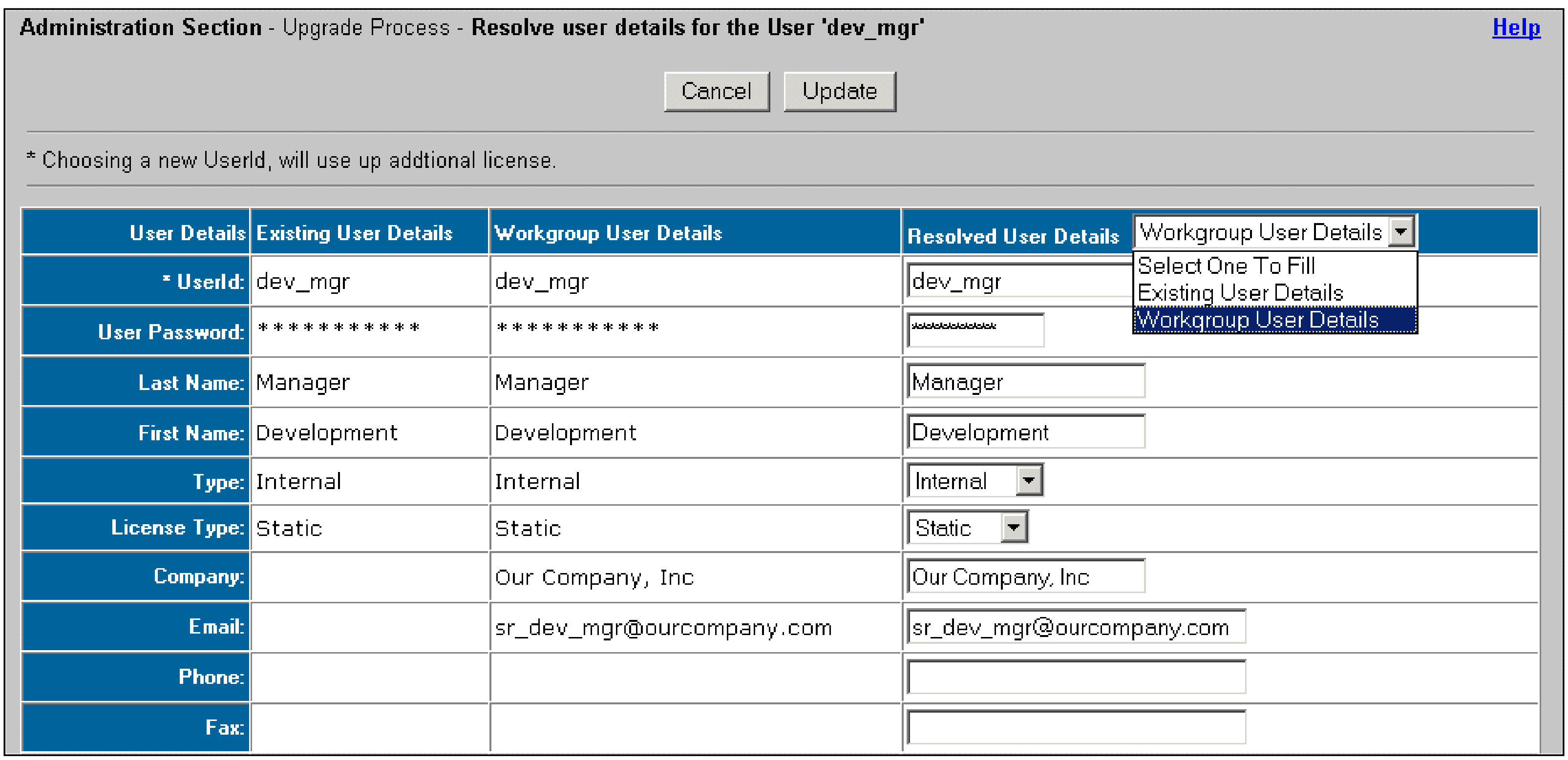
This option should only be used to upgrade workgroups in the 4.x or 5.x series. To upgrade a version 3.x workgroup, please review the Version 3.x Upgrade section.

It is recommended that you enter the relevant license keys prior to upgrading your workgroups. If the users in the workgroup you are upgrading are of a license type that does not correspond to your license keys, your users may be blocked from accessing ProblemTracker until you update the license types or enter the license key(s) so the user information corresponds with information entered into the License Manager. For example, if you are upgrading a workgroup that contains users with license type set to "Floating", but you do not have a "Floating" license key entered for the latest version, your users will not be able to login to ProblemTracker until you enter your Floating License Key into the License Manager. For information on changing the license type of a user, please use the Edit a User operation after you have successfully upgraded the workgroup. For information on entering your license key information, review the Windows 2003 / XP / 2000 Time Zones
Windows NT 4.0 Time Zones

Click on the **Upgrade Data** button to proceed, then click **OK** to confirm.

Upgrade Users from 4.x to the Latest Version After the data has been upgraded successfully, a confirmation page will be displayed. You will be prompted to upgrade your users. In the latest version, users for all workgroups are added and maintained in the License Administration section. When upgrading a workgroup from Version 4.x to the latest version, each user must be upgraded so that the user account can be maintained using the License Administration section. Click on the **Upgrade Users** button to proceed.

If there are conflicts present in your user accounts, you will be prompted to resolve these conflicts before you can proceed with upgrading your users. A user conflict can occur if you have a user id present in multiple workgroups with different profile information. For example, if you have a user account called dev_mgr which is present in 2 workgroups, but this user account has a different Name and Email Address in each workgroup (as shown in the image below). You will need to choose which information will be associated with this user for both workgroups.

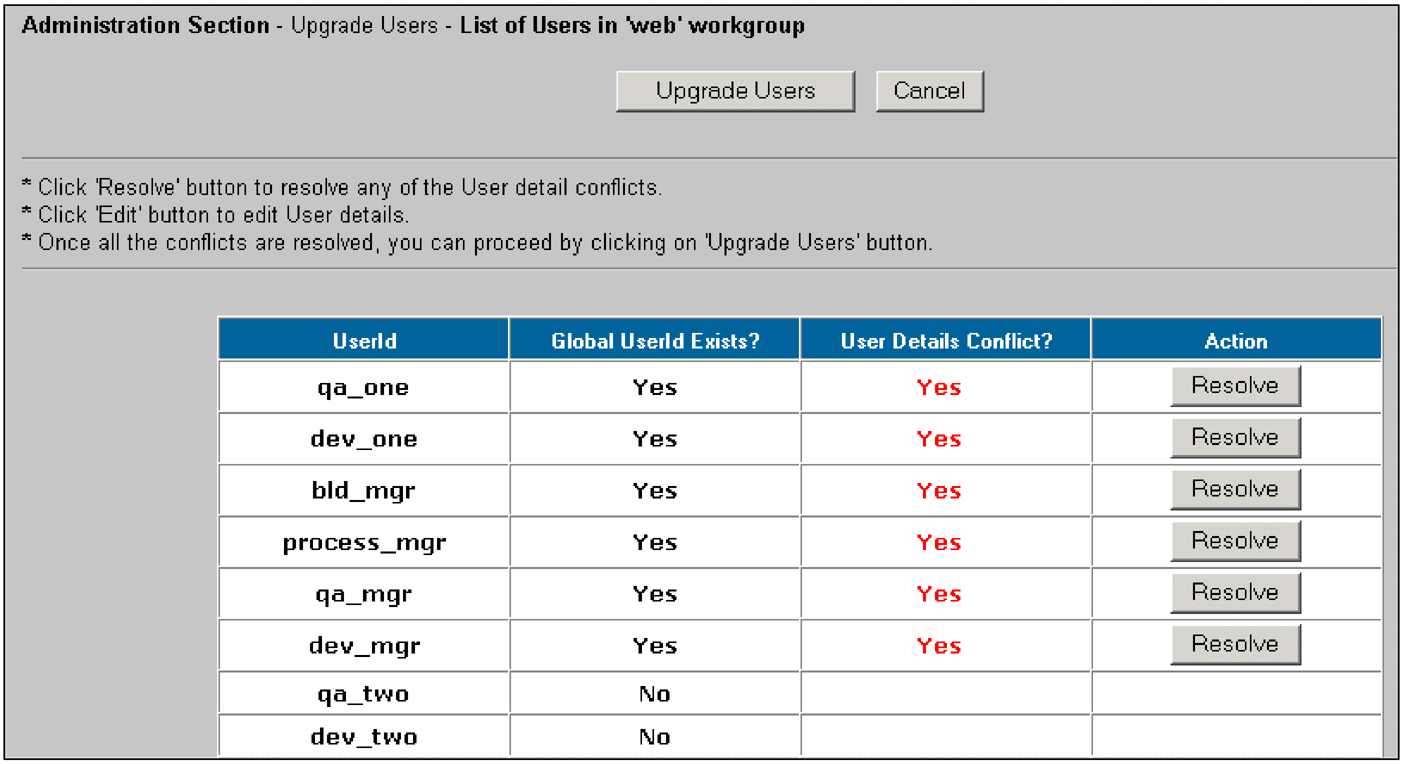

Administration Section - Upgrade Process - **Resolve user details for the User 'dev_mgr'** Help

Cancel Update

* Choosing a new UserId, will use up addtional license.

User Details	Existing User Details	Workgroup User Details	Resolved User Details: Workgroup User Details (Select One To Fill / Existing User Details / Workgroup User Details)
* UserId:	dev_mgr	dev_mgr	dev_mgr
User Password:	***********	***********	**********
Last Name:	Manager	Manager	Manager
First Name:	Development	Development	Development
Type:	Internal	Internal	Internal
License Type:	Static	Static	Static
Company:		Our Company, Inc	Our Company, Inc
Email:		sr_dev_mgr@ourcompany.com	sr_dev_mgr@ourcompany.com
Phone:			
Fax:			

After clicking on the **Upgrade Users** button, if there any user conflicts, a page similar to the image below will be displayed.



Administration Section - Upgrade Users - **List of Users in 'web' workgroup**

Upgrade Users | Cancel

* Click 'Resolve' button to resolve any of the User detail conflicts.
* Click 'Edit' button to edit User details.
* Once all the conflicts are resolved, you can proceed by clicking on 'Upgrade Users' button.

UserId	Global UserId Exists?	User Details Conflict?	Action
qa_one	Yes	Yes	Resolve
dev_one	Yes	Yes	Resolve
bld_mgr	Yes	Yes	Resolve
process_mgr	Yes	Yes	Resolve
qa_mgr	Yes	Yes	Resolve
dev_mgr	Yes	Yes	Resolve
qa_two	No		
dev_two	No		

Users with "Yes" displayed in the **User Details Conflict?** column need to be resolved before you can continue with the upgrade. Click on the **Resolve** button in the "Action" column of each user id to resolve the conflict. On the next page, details of the user conflict will be displayed. The first column "Existing User Details" shows the user profile information already present for this user account in the License Administration section (this information could be present if you already upgraded another workgroup that contained a user account with the same user id). The second column "Workgroup User Details" contains the user profile information for this user id present in the workgroup you are attempting to upgrade.

To **resolve** the user conflict:

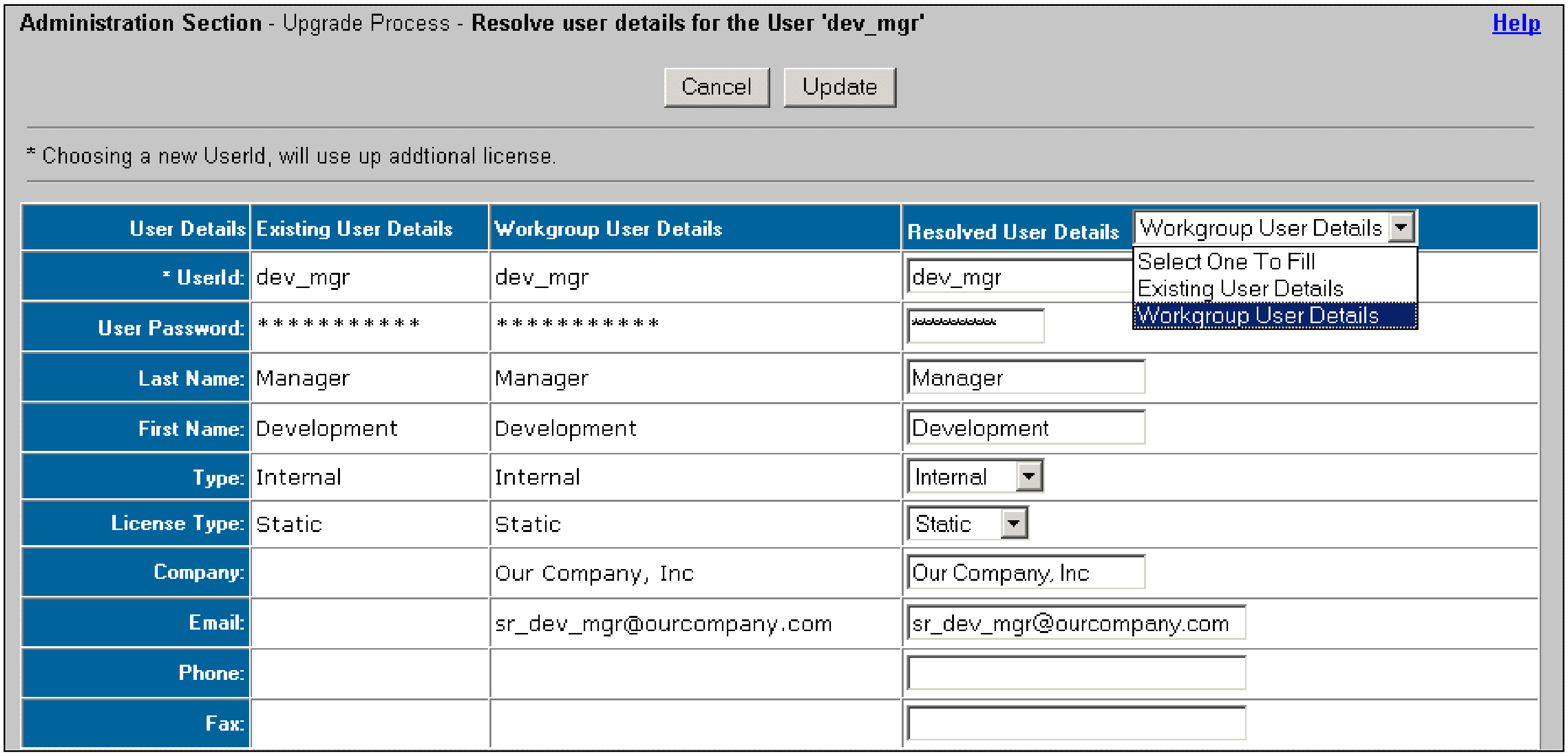
- You can either select the user profile information present in one of the columns (by selecting either **Existing User Details** or **Workgroup User Details** in the pulldown at the top of the **Resolved User Details** column). Click on the **Update** button to proceed.

  OR

- You can select the user profile information present in one of the columns (by selecting either **Existing User Details** or **Workgroup User Details** in the pulldown at the top of the **Resolved User Details** column), then change any of the information you would like to save in the user's profile. Choosing this option will result in the user account being saved with the profile information entered in the Resolved User Details column. Click on the **Update** button to proceed.

  OR

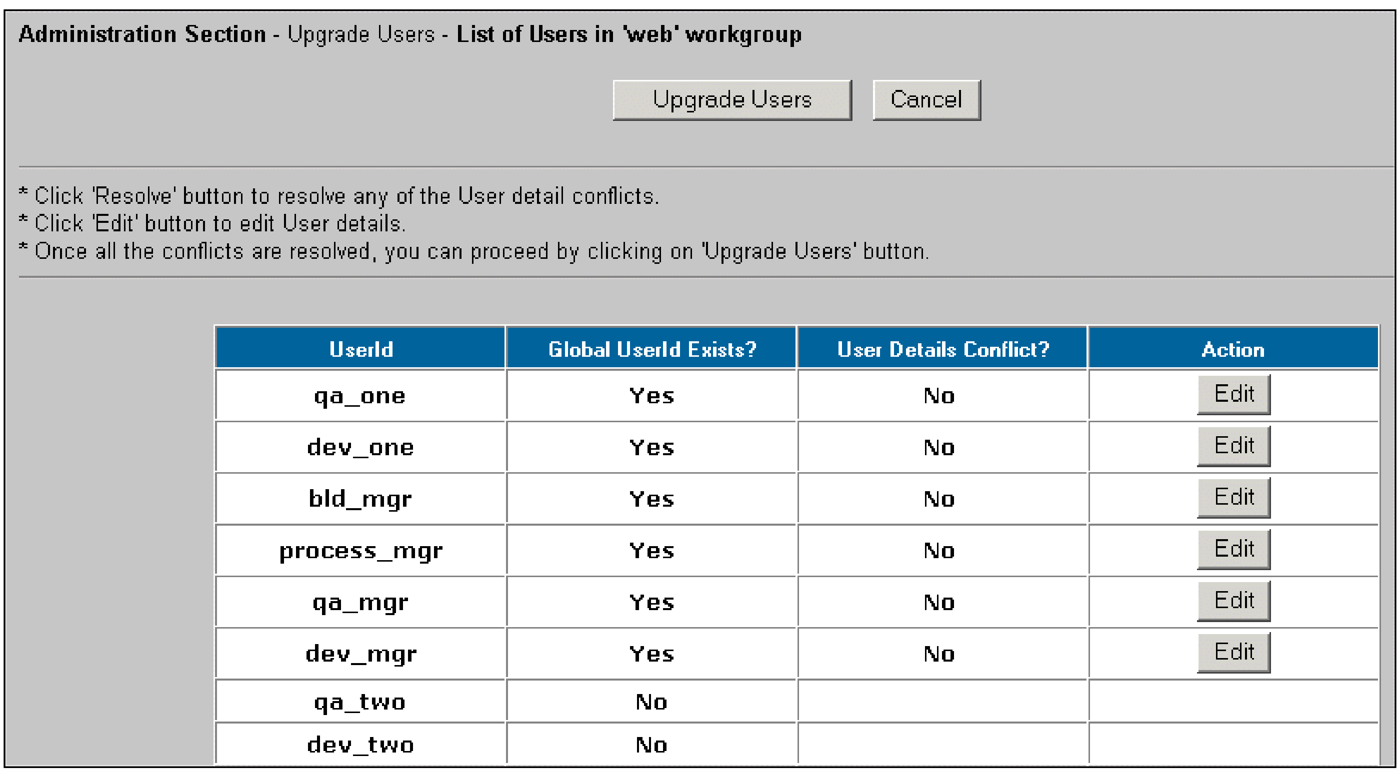
- You can create a new user account to resolve the conflict. To choose this option, select the user profile information present in one of the columns (by selecting either **Existing User Details** or **Workgroup User Details** in the pulldown at the top of the **Resolved User Details** column), then change the user id in the Resolved User Details column to be different from the user id displayed in the other columns. You cannot select a user id that is already in use by another workgroup or a user id that is the same as a default user (such as dev_one, dev_mgr, process_mgr, etc.). You may also change any other user profile information in the Resolved User Details column, then click on the **Update** button to create this new user account. This will resolve the user conflict and the existing user account already present in the Workgroup Management System (displayed in the Existing User Details column) will be preserved. This new user account will be counted toward the license limits for the keys you have entered in the ProblemTracker License Manager. Once you have renamed the user id and click on the **Update** button, you will not have another opportunity to change this user's profile information until after the **Upgrade Users** process is complete. After the users have been upgraded, you can use the Edit User option in the License Administration section to make changes to this user.



After making your selection and / or entering the user details in the **Resolved User Details** column, click on the **Update** button. Click on the **Resolve** button for another user to continue resolving the conflicts.

Users with "No" displayed in the **User Details Conflict?** column do not have a conflict present. If you wish to modify the profile information for a user which had a conflict resolved, click on the **Edit** button displayed in the "Action" column for the user account, modify the profile information in the **Resolved User Details** column, then click **Update** to save your changes.

Once all users have "No" listed in the **User Details Conflict?** column and there are no longer any **Resolve** buttons in the "Action" column (as shown in the image below), you can proceed with the upgrade process by clicking on the **Upgrade Users** button. A confirmation will be displayed when the user upgrade process is complete.



Click on the **Home** icon to return to the Workgroup Management System Home Page. Your upgraded workgroup will now be displayed on the list of workgroups on the Home Page. To login to your upgraded workgroup, click on the key icon to the left of the name of your upgraded workgroup. A separate window will be launched with the workgroup's login page.

Editing a User Profile during the Upgrade Users operation

When the **Edit** button is present in the Action column during the process of upgrading users, you can click on the **Edit** button to make changes to a user's profile. The Edit button will not be displayed for any users which did not have a user conflict. You can only edit users without conflicts after the Upgrade Users operation is complete by using the Edit User option in the License Administration section. After clicking on the **Edit** button in the "Action" column of a user, you can select one of the following options to make changes to the user:

- Select the **Existing Workgroup Details** option in the pulldown at the top of the Resolved User Details column to fill the **Resolved User Details** column with the profile information present in the Existing Workgroup Details column. You can change the information in the Resolved User Details column, then click **Update** to save the changes.

  OR

- Select the **Workgroup User Details** option in the pulldown at the top of the Resolved User Details column to fill the **Resolved User Details** column with the profile information present in the Workgroup User Details column. You can change the information in the Resolved User Details column, then click **Update** to save the changes.

  OR

- Select the **Resolved User Details** option in the pulldown at the top of the Resolved User Details column to fill the Resolved User Details column with the profile information you last saved for this user when you were resolving the conflict (by clicking on the **Resolve button** from the list of conflicts). You can change the information in the Resolved User Details column, then click **Update** to save the changes.

WMS Maintenance Operations

The Maintenance Operations section is available to make repairs to the WMS or Users database. This interface should only be used under the direction of NetResults Technical Support. Use of this interface without the guidance of NetResults personnel could result in **permanent data loss**.

NetResults ProblemTracker

License Administration Overview

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Users

The License Administration section of the Workgroup Management System (WMS) allows you to add and maintain users for all workgroups in a central interface. The number of users that can be added to the License Administration section depends on the number and type of licenses you have entered in the License Manager. Once your users have been created and given access to specific workgroups using the License Administration operations below, your users can begin using ProblemTracker.

The following are the user operations available in the License Administration section:

- Adding a User
- Editing a User
- Deleting a User
- Editing a User's Access to a Workgroup
- Editing a Workgroup's List of Users
- List Users
- License Summary
- Synchronizing a User
- Administration Options

To perform an operation in the License Administration section of WMS:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the button bar
3. Select the radio button to the left of the option desired
4. Click on the **Continue** button

Individual sections of this Help documentation can also be accessed from within the Workgroup Management System by clicking on the Help link in the upper right corner of each page.

NetResults ProblemTracker

Adding a User

Help Topics | << | >>

Constraints to Consider before Adding a User

Users

A user account must be created in the License Administration section before the user can begin using ProblemTracker. The number of users that can be added to the License Administration section depends on the number and type of licenses you have entered in the License Manager. Each user created in the License Administration section can be given access to multiple workgroups.

When adding a new user, the profile information (email address, phone number, etc.) can be entered. This profile information will be displayed in all workgroups to which the user is given access. When entering information for a new user account, consider the character set of the workgroup(s) the user will be accessing. A user can only be given access to a workgroup with a character set that supports the characters entered in the user's profile. For example, if a user is created with UTF-8 characters in the profile, this user account can only be given access to a workgroup with UTF-8 selected as the character set.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets (all workgroups) support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character sets.
- As mentioned above, if a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

For information on checking a workgroup's character set, review the Viewing a Workgroup section. To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

Adding a User

The following are the steps that need to be done in order to add a new user and allow this user to begin using ProblemTracker:

1. Add a user to the License Administration section of the Workgroup Management System using the steps below
2. Give the user access to the necessary workgroup(s) using the Editing a User's Access to Workgroups option in the License Administration section
3. For each workgroup that the user will access, add the user to the User Administration page of the Admin section in the workgroup

To **add** a new user:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the top button bar
3. Select the radio button to the left of the option **Add User**, then click on the **Continue** button
4. Enter information into the fields listed on the **Add New User Account** page

   Enter information into the following required fields on the "Add New User Account" page:

   - **User Id**
     Unique identifier for user. May be up to 40 characters long.

   - **Password**
     Login password for user. May be up to 10 characters long.

   - **Last Name**
     User's last name

   - **First Name**
     User's first name

   - **License Type**
     Can be Static, Floating, or Restricted. See Definition of Users by License Type for further information.

   - **User Type**
     Can be either Internal or External. A user with **External** selected as the user type cannot be assigned to any record (these users are not listed in the **Assigned To** pulldown for selection during the workflow process in the workgroups). If **Restricted** is selected as the License type above, you must select **External** as the User Type.

     Users with **Static** or **Floating** selected as the License Type are also referred to as **Unrestricted** or **Non-Restricted** users in various areas of the Help Guides.

   - **Company**
     User's company name

   - **Email**
     Email address of the user. Used by ProblemTracker for email notification of events.

   - **Phone**
     User's phone number

   - **Fax**
     User's fax number

- **Address 1**
  First line of user's address
- **Address 2**
  Second line of user's address
- **City**
  User's city
- **State**
  User's state
- **Zip**
  User's zip code
- **Country**
  User's country
- **Comments**
  Any other information about the user to be included in his or her profile information

5. After entering the information, click on the **Add User** button to save this new user account.
6. A confirmation will be displayed after the user is successfully added. Click on the **Add Workgroup Access** button to specify which workgroups this user will be able to access. Details on giving a user access to a workgroup(s) can be found in the Editing a User's Access to Workgroups Help section.
7. After a user is given access to a workgroup, the user must be added to the User Administration section of each workgroup. Only after doing this will the user will be able to login to the workgroup(s) and begin using ProblemTracker.

The information entered in a user's profile can be viewed by users when the **Assigned To** or **Reported By** fields are displayed on the View page or in the Home Page and Query reports. The user's name will appear as a clickable link for those users which have the **View User Information** privilege. Clicking on the user's name will display the details present in the user's profile.

Managing Users within License Limits

If you attempt to add more users than are allowed by your license(s), ProblemTracker will notify you that you have reached the maximum number of users for your license type. If you have more than one type of license (a mix of static, floating, or restricted licenses), the error will tell you which license type has reached its limit. You will need to delete another user account before you are allowed to create a new user account.

Definition of Users by License Type

There are three types of licenses available for use with ProblemTracker: Static, Floating, and Restricted. For all three license types only one user (person) may be logged in to ProblemTracker per license. In other words, the maximum number of people that may be logged in to ProblemTracker at any one time is equal to the total number of Static, Floating, and Restricted licenses you have. The difference between the license types is how many user accounts may be created per license and what ProblemTracker features may be used.

- **Static**
  One user account (User ID) may be created for each Static license. Since there is only one user account per license, users with Static accounts can always log in to ProblemTracker. Static licenses are typically used for people who regularly use ProblemTracker and therefore must be guaranteed access at any time.

  Static users are also referred to as "Unrestricted" or "Non-restricted" users in various areas of the Help Guides.

- **Floating**
  Up to ten (10) user accounts (User IDs) may be created for each Floating license. However, only one person per Floating license may be logged in to ProblemTracker at one time. Others who try will be denied access until another Floating license user logs off (clicks the Logoff icon). For instance, if you have 5 Floating licenses, you can have up to 50 Floating user accounts, but no more than 5 of those 50 users may be logged in to ProblemTracker at the same time. Floating licenses are typically used for infrequent users if it is acceptable that they may not be able to login to the system some of the time (as all Floating licenses may be in use). Although you can create up to ten user accounts per Floating license, we generally recommend one Floating license for every two to three users to minimize the number of times users can not log in because all Floating licenses are in use.

  Floating users are also referred to as "Unrestricted" or "Non-restricted" users in various areas of the Help Guides.

- **Restricted**
  One user account (User ID) may be created for each Restricted license. Since there is only one user account per license, users with Restricted accounts can always log in to ProblemTracker. However, unlike the Static and Floating license types, users with Restricted user accounts can only perform a very limited number of ProblemTracker operations. They are only allowed to Add new records (report issues), View records that they previously added (check status on issues they have reported), and run text reports (Saved Queries) on the Home page to view summaries of records they have added. A Restricted user can not perform any other operations (such as Edit, Task, Delete, Query, Metrics, History, Discuss, etc.); can not be the Assignee for a record; can not display Metrics (Saved Charts) on the Home page; can not view information about alerts, discussions, or source code files; and can not view any records which she did not Add. Restricted licenses are typically used for external users who only need to submit issues to ProblemTracker and track the progress of these issues. For example, if you have a large number of customers who only submit reports to your Support organization very infrequently, you could give those users Restricted licenses.

For more details on licensing including your License Agreement and the number and type of license(s) you have, please run the License Manager.

NetResults ProblemTracker

Editing a User

Help Topics | << | >>

Users

The information stored in a user account can be modified to change the contact information or to change the type of license being used by the account.

To **edit** a user account:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the top button bar
3. Select the radio button to the left of the option called **Edit User**, then click on the **Continue** button
4. In the pulldown menu, select the user account that you wish to edit, then click on the **Edit** button
5. Make changes to the user account information. You can edit any of the values in the user account except for the **User Character Set**.
6. Click on the **Save** button to save your changes
7. A confirmation of the operation will be displayed. Any changes to the user account will be updated in the workgroups to which the user has access.

The User Character Set listed in a user account is set based on the characters entered in the rest of the fields in the user's profile information. For example, if characters that are only supported by the UTF-8 character set are present in a user's profile, the User Character Set will be updated to reflect UTF-8. The User Character Set determines which workgroups a user can access because the User Character Set must be compatible with the workgroup's character set. For example, if a user is created with UTF-8 characters in the profile, this user account can only be given access to a workgroup with UTF-8 selected as the character set.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets(all workgroups) support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- As mentioned above, if a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

Editing Restricted Users

If you are editing a user with **Restricted** selected as the **License Type**, the **User Type** field must be set to **External**. Users with **External** set as the user type cannot be assigned to records in the ProblemTracker workgroups (users of this type are not displayed in the **Assigned To** pulldown field).

NetResults ProblemTracker

Deleting a User

Help Topics | << | >>

If a user has been added to the one or more workgroups, the user must be deleted from the User Administration section of each workgroup before the user account can be deleted from the Workgroup Management System (WMS).

Once a user has been deleted from the User Administration section of the workgroup(s), the user account can be deleted from WMS by performing the following steps:

1. Login to WMS
2. Click on the **Users** icon in the top button bar
3. Select the radio button to the left of the option called **Delete User**, then click on the **Continue** button
4. In the pulldown menu, select the user account that you wish to delete, then click on the **Delete** button
5. Click **OK** to confirm the delete operation
6. A confirmation page will be displayed

NetResults ProblemTracker

Editing a User's Access to Workgroups

Help Topics | << | >>

Users

Before a user can login and begin using ProblemTracker, the user must be given access to the workgroup(s) using the steps listed below and must be added to the workgroup's User Administration section.

There are two ways to grant a user access to a workgroup:

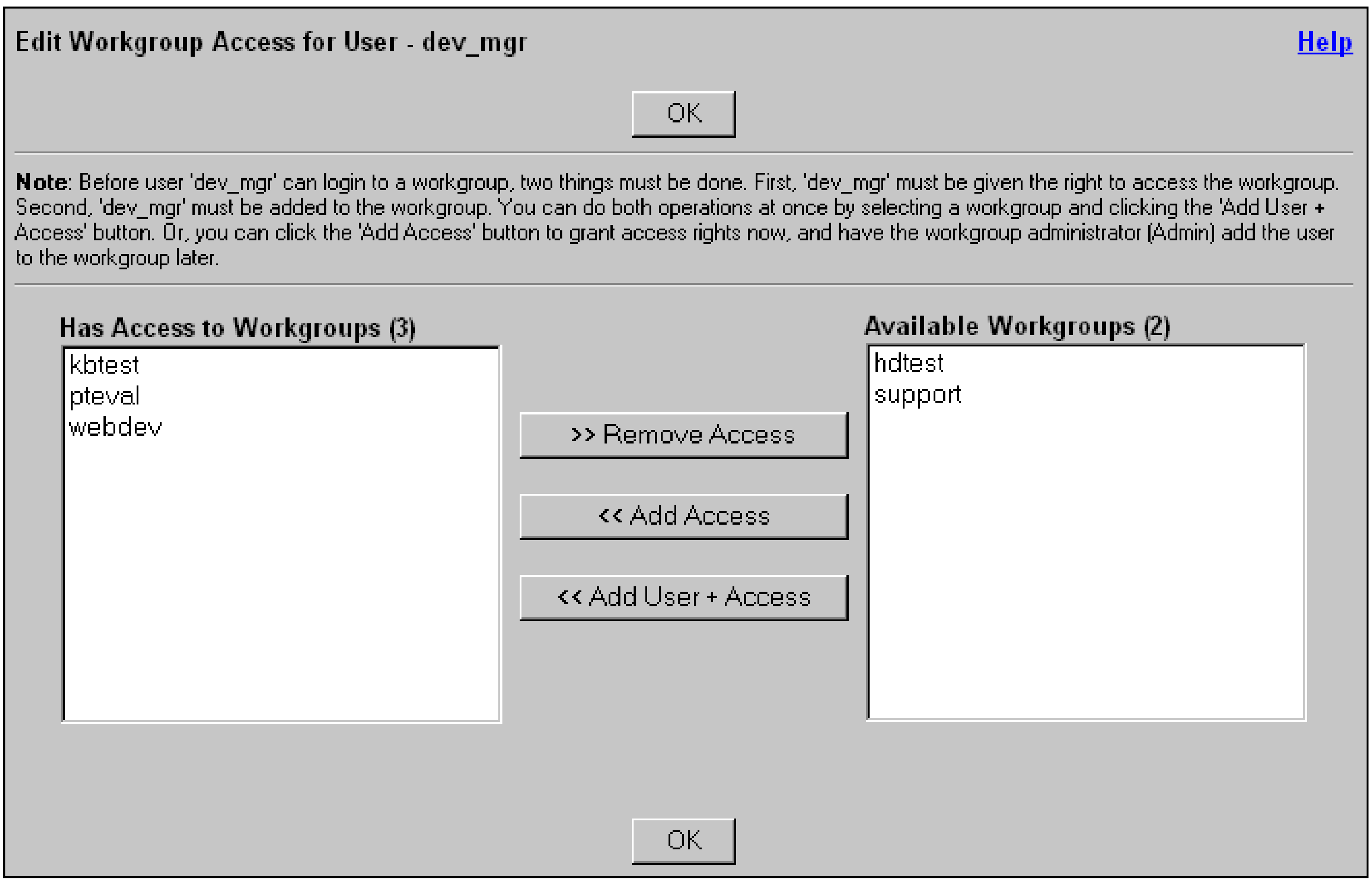
- **Select a user and modify the list of workgroups he or she can access**
  Details on using this option to grant a user access to a workgroup are included in this Help section.

  OR

- **Select a workgroup and modify the list of users that have access**
  To use this option, go to the Editing a Workgroup's List of Users section.

To select a user and **edit the list of workgroups that this user can access**:

1. Login to the Workgroup Management System.
2. Click on the **Users** icon in the top button bar.
3. Select the radio button to the left of the option called **Edit Workgroup Access**, then click on the **Continue** button.
4. In the pulldown menu, select the user account whose workgroup access you wish to edit, then click on the **Edit** button.



5. The left column called **Has Access to Workgroups** displays any workgroups that the user is allowed to access. It also includes a count of the number of workgroups displayed in the column. The right column called **Available Workgroups** displays workgroups

that the user is not yet allowed to access. It also includes a count of the number of workgroups displayed in the column. To allow a user to access a workgroup that is listed in the **Available Workgroups** column, click on the workgroup, then click on the **Add Access** button to move the workgroup to the **Has Access to Workgroups** column. To select multiple workgroups, hold down the **CTRL** button on your keyboard as you click on the workgroups you wish to select, then click on the **Add Access** button.

Note: Users with access rights to a workgroup may still not be able to login to the workgroup if the workgroup administrator has never added the user to the workgroup. A user must both have access rights to the workgroup **and** be a part of the workgroup (the workgroup administrator must use the Add User operation from within the workgroup). This two step process is typically used if the WMS administrator and the workgroup administrator are not the same person (that way both people must agree that the user is allowed to access the workgroup before the user can log in). If you would like to both give a user access rights and add them to the workgroup at the same time, you can do so by clicking on the **Add Users + Access** button instead of the **Add Access** button after you've selected the workgroup(s). Even if you have used the **Add Users + Access** operation, you may still wish to login to each workgroup as Admin and configure the User Groups for the user (by default they will only be made a member of the Users or RestrictedUsers User Group).

If the user you selected has characters in their user information (name, address, etc.) that can not be displayed in an ISO-8859-1 or Windows-1252 workgroup, then the list of workgroups displayed in the **Available Workgroups** column may not include all workgroups for which the user does not have access rights. Any workgroup which can not display the full user information will not be listed. If you have selected a user with such characters, a note will be displayed at the bottom of the **Available Workgroups** column warning you that not all workgroups may be listed here.

Some basic guidelines related to user / workgroup character set compatibility:

- As mentioned above, if a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- If a user account contains non-ASCII characters only supported by the UTF-8 character set, this user account can only be given access to a workgroup configured with the UTF-8 character set.

For information on checking a workgroup's character set, review the Viewing a Workgroup section. To check a user's character set, use the Edit a User operation. To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

6. The last step to be performed before a user is allowed to login and begin using a ProblemTracker workgroup is to add the user to the User Administration section of the workgroup(s) which the user is allowed to access.

Removing a User's Access to a Workgroup

To **remove** a user's access to a workgroup:

1. Login to the Workgroup Management System.
2. Click on the **Users** icon in the top button bar.
3. Select the radio button to the left of the option called **Edit Workgroup Access**, then click on the **Continue** button.
4. In the pulldown menu, select the user account whose workgroup access you wish to edit, then click on the **Edit** button.
5. Click on the workgroup in the **Has Access to Workgroups** column, then click on **Remove Access** button to move the workgroup back to the **Available Workgroups** column. To select multiple workgroups, hold down the **CTRL** button on your keyboard as you click on the workgroups you wish to select, then click on the **Remove Access** button.

NetResults ProblemTracker

Editing a Workgroup's List of Users

Before a user can login and begin using ProblemTracker, the user must be given access to the workgroup(s).

There are two ways to grant a user access to a workgroup:

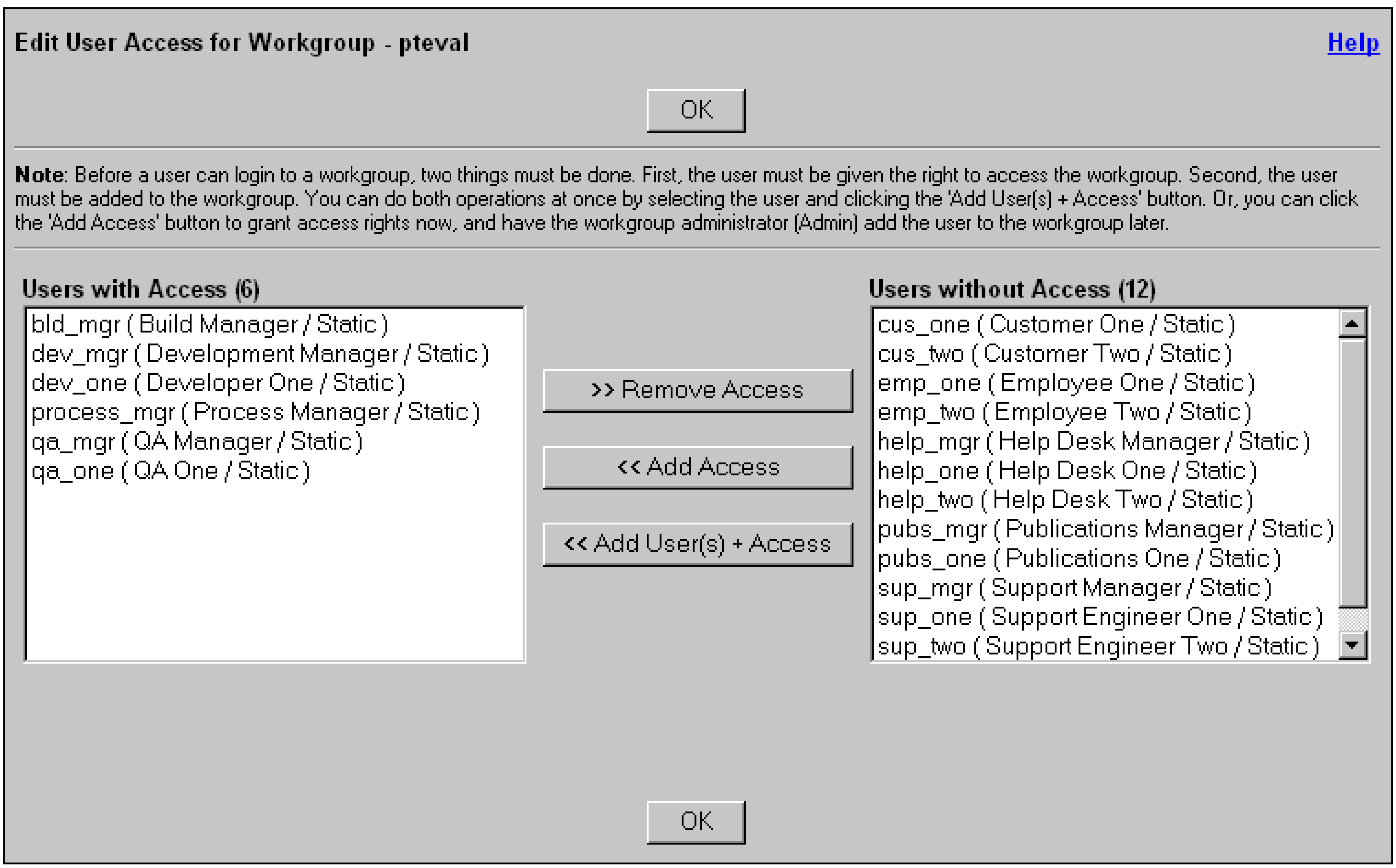
- **Select a workgroup and modify the list of users that have access**
  Details on using this option are included in this Help section.

  OR

- **Select a user and modify the list of workgroups he or she can access**
  To use this option, go to the [Editing a User's Access to Workgroups] section.

To select a workgroup and **edit the list of users that can access the workgroup**:

1. Login to the [Workgroup Management System].
2. Click on the **Users** icon in the top button bar.
3. Select the radio button to the left of the option called **Edit User Access**, then click on the **Continue** button.
4. In the pulldown menu, select the workgroup you wish to edit, then click on the **Edit** button.



5. The left column called **Users with Access** displays any users that are allowed to access this workgroup. It also includes a count of the number of users with access to this workgroup. The right column called **Users without Access** displays users that do not yet have access to this workgroup. It also includes a count of the number of users without access. To allow a user to access the workgroup, click on the user in the **Users without Access** column, then click on the **Add Access** button to move the user to the **Users with Access** column. To select multiple users, hold down the **CTRL** button on your keyboard while you click on the users in the **Users without Access** column, then click on the **Add Access** button.

Note: Users with access rights to a workgroup may still not be able to login to the workgroup if the workgroup administrator has never added the user to the workgroup. A user must both have access rights to the workgroup **and** be a part of the workgroup (the workgroup administrator must use the Add User operation from within the workgroup). This two step process is typically used if the WMS administrator and the workgroup administrator are not the same person (that way both people must agree that the user is allowed to access the workgroup before the user can log in). If you would like to both give a user access rights and add them to the workgroup at the same time, you can do so by clicking on the **Add Users(s) + Access** button instead of the **Add Access** button after you've selected the users. Even if you have used the **Add Users(s) + Access** operation, you may still wish to login to the workgroup as Admin and configure the User Groups for the user(s) you have added (by default they will only be made a member of the Users or RestrictedUsers User Group).

If the workgroup you selected uses the ISO-8859-1 or Windows-1252 character set, the list of **Users without Access** may not include all users without access rights to the workgroup. The reason is that some users may have characters in their user information (name, address, etc.) that can not be displayed in the workgroup you've selected. These users can not be given access to the workgroup. If you have selected a workgroup that uses the ISO-8859-1 or Windows-1252 character set, a note will appear at the bottom of the **Users without Access** list to note that some users may not be listed here.

Some basic guidelines related to user / workgroup character set compatibility:

- If a user account contains only ASCII characters (supported by ISO-8859-1 character set), this user account can be given access to any workgroup because all character sets support ASCII characters.
- If a user account contains non-ASCII characters supported by the Windows-1252 character set, this user account can be given access to any workgroup that is configured with the Windows-1252 or UTF-8 character set.
- If a user account contains non-ASCII characters only supported by the UTF-8 character set (such as Japanese or Chinese characters), this user account can only be given access to a workgroup configured with the UTF-8 character set.

To view a user's character set, use the Edit a User operation in the License Administration section. To see a list of characters supported by each character set, review the information in the Adding a Workgroup section.

6. The last step to be performed before a user is allowed to login and begin using a ProblemTracker workgroup is to add the user to the User Administration section of the workgroup(s) which the user is allowed to access.

Removing Users from a Workgroup's Access List

To **remove** a user from a workgroup's access list:

1. Login to the Workgroup Management System.
2. Click on the **Users** icon in the top button bar.
3. Select the radio button to the left of the option called **Edit User Access**, then click on the **Continue** button.
4. In the pulldown menu, select the workgroup you wish to edit, then click on the **Edit** button.
5. Click on the user in the **Users with Access** column, then click on the **Remove Access** button. To select multiple users, hold down the **CTRL** button on your keyboard while you click on the users you wish to select, then click on the **Remove** button.

NetResults ProblemTracker

List Users

Help Topics | << | >>

Users

The List Users operation allows you to view details about all users in a list format.

To access a list of all user accounts in your ProblemTracker installation:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the top button bar
3. Select the option called **List Users**, then click on the **Continue** button

At the top of the **List All User Accounts** page, the total maximum number of accounts and currently used accounts are displayed.

- **Maximum Allowed Static User Accounts**
  The maximum number of user accounts that can be created with **Static** selected for the license type. This limit is equal to the number of users entered for the Static License Key in the License Manager.

- **Currently Used Static User Accounts**
  The total number of user accounts created with the **Static** selected as the license type

- **Maximum Allowed Floating User Accounts**
  The maximum number of user accounts that can be created with **Floating** selected for the license type. This limit is equal to 10 times the number of users entered for the Floating License Key in the License Manager. For example, if 5 users are listed for the Floating License Key, a maximum of 50 floating user accounts can be created.

- **Currently Used Floating User Accounts**
  The total number of user accounts created with the **Floating** selected as the license type

- **Maximum Allowed Restricted User Accounts**
  The maximum number of user accounts that can be created with **Restricted** selected for the license type. This limit is equal to the number of users entered for the Restricted License Key in the License Manager.

- **Currently Used Restricted User Accounts**
  The total number of user accounts created with the **Restricted** selected as the license type

The table shows user profile information for user accounts such as User Id, Full Name, Email Address, Company Name, License Type, and the workgroups which the user is allowed to access.

Total User Accounts	Static	Floating	Restricted
Maximum Allowed	20	0	0
Currently Used	6	0	0

Page 1 of 1

Action	UserId	Full Name	Email	Company	License Type	Access to Workgroup(s)
	bld_mgr	Build Manager	bld_mgr@ourcompany.com	Our Company Inc.	Static	pteval
	dev_mgr	Development Manager	dev_mgr@ourcompany.com	Our Company Inc.	Static	pteval
	dev_one	Developer One	dev_one@ourcompany.com	Our Company Inc.	Static	pteval
	process_mgr	Process Manager			Static	pteval
	qa_mgr	QA Manager	qa_mgr@ourcompany.com	Our Company Inc.	Static	pteval
	qa_one	QA One	qa_one@2ndcompany.com	2nd Company Inc.	Static	pteval

Page 1 of 1

User Operations

Click on the **View User** icon to view the user profile information for a user account. A second window will be launched to display the user's account information.

Click on the **Edit User** icon to edit the user profile information for a user account. Make the desired changes to the user profile information, then click on the **Save** button to save the changes. More information about editing user account information can be found in the Editing a User section.

Click on the **Delete User** icon to delete a user account. You will only be able to delete a user account if it has been deleted from the User Administration section of all workgroups in which the account was added. More information about deleting user accounts can be found in the Deleting a User section.

Click on the **Edit Workgroup Access for User** icon to add or remove access to workgroup(s) for this user account. More information on editing the workgroup access for a user account can be found in the Editing a User's Access to Workgroups section.

NetResults ProblemTracker

License Summary

Help Topics | << | >>

Users

The Summary section displays workgroup information such as the number of users per license type added to each individual workgroup.

To access a summary of the number of accounts associated with each workgroup:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the top button bar
3. Select the option called **Summary**, then click on the **Continue** button

Summary of License Limits

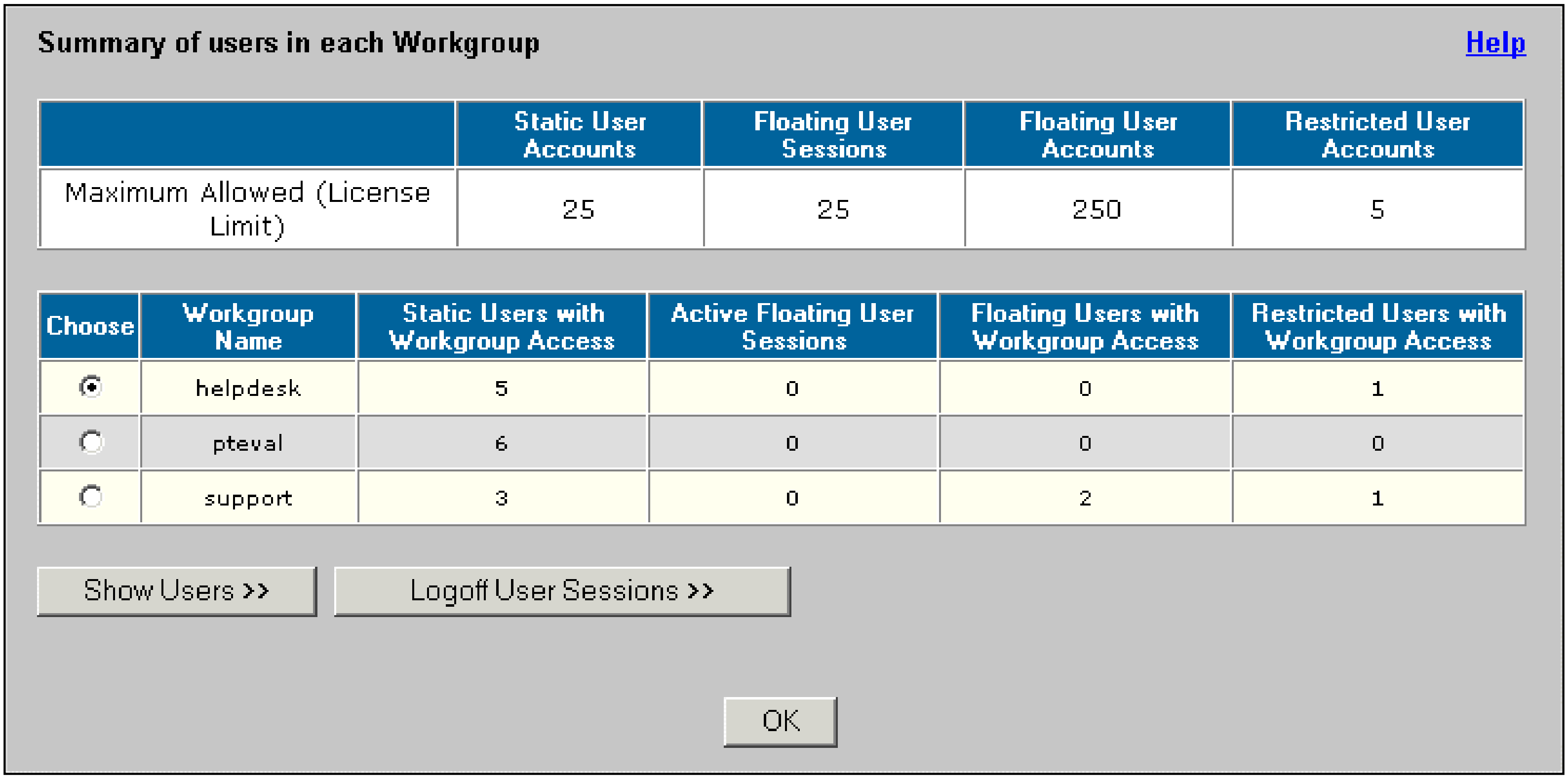
At the top of the **Summary** page, the license limits for your installation are displayed in the **Maximum Allowed (License Limit)** table include:

- **Static User Accounts**
  The maximum number of user accounts that can be created in the License Administration section with **Static** selected as the license type. This limit is equal to the number of users entered for the Static License Key in the License Manager.

- **Floating User Sessions**
  The maximum number of users with **Floating** selected as the license type that can be actively logged into ProblemTracker at any given time. This limit is equal to the number of users entered for the Floating License Key in the License Manager.

- **Floating User Accounts**
  The maximum number of user accounts that can be created in the License Administration section with **Floating** selected as the license type. This limit is 10 times the number of maximum floating user sessions listed above. For example, if the maximum number of floating user sessions is 5, then the maximum number of floating user accounts is 50. This indicates that although there are 50 user accounts with the floating license type, only 5 of these user accounts can be logged in concurrently.

- **Restricted User Accounts**
  The maximum number of user accounts that can be created in the License Administration section with **Restricted** selected as the license type. This limit is equal to the number of users entered for the Restricted License Key in the License Manager.



Workgroup User Account Summary

The second table in the Summary section displays user account totals for each workgroup. The values in this table include:

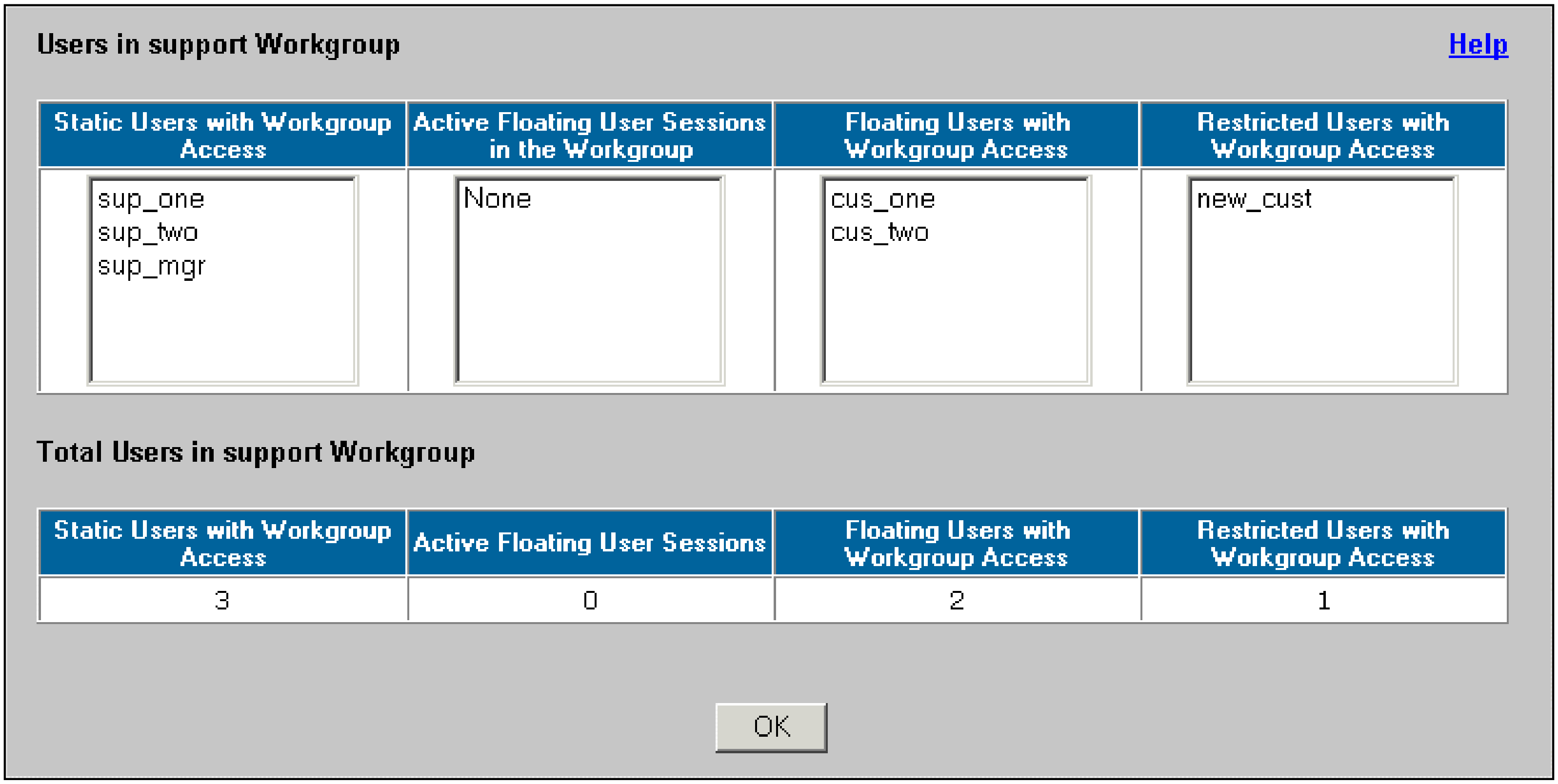
- **Static Users with Workgroup Access**
  The number of user accounts with **Static** selected as the license type which have been given access to the workgroup
- **Active Floating User Sessions**
  The number of users with **Floating** selected as the license type that are currently logged into the workgroup
- **Floating Users with Workgroup Access**
  The number of user accounts with **Floating** selected as the license type which have been given access to the workgroup.
- **Restricted Users with Workgroup Access**
  The number of user accounts with **Restricted** selected as the license type which have been given access to the workgroup

Show Users Associated with a Workgroup

If you wish to see the individual user names associated with a particular workgroup in the table above, select the radio button to the left of the workgroup name, then click on the **Show Users** button.

- **Static Users with Workgroup Access**
  The user names with **Static** selected as the license type which have been given access to the workgroup
- **Active Floating User Sessions**
  The user names with **Floating** selected as the license type that are currently logged into the workgroup
- **Floating Users with Workgroup Access**
  The user names with **Floating** selected as the license type which have been given access to the workgroup
- **Restricted Users with Workgroup Access**
  The user names with **Restricted** selected as the license type which have been given access to the workgroup

A summary of the totals for each category listed above is displayed at the bottom of the page as in the example below.



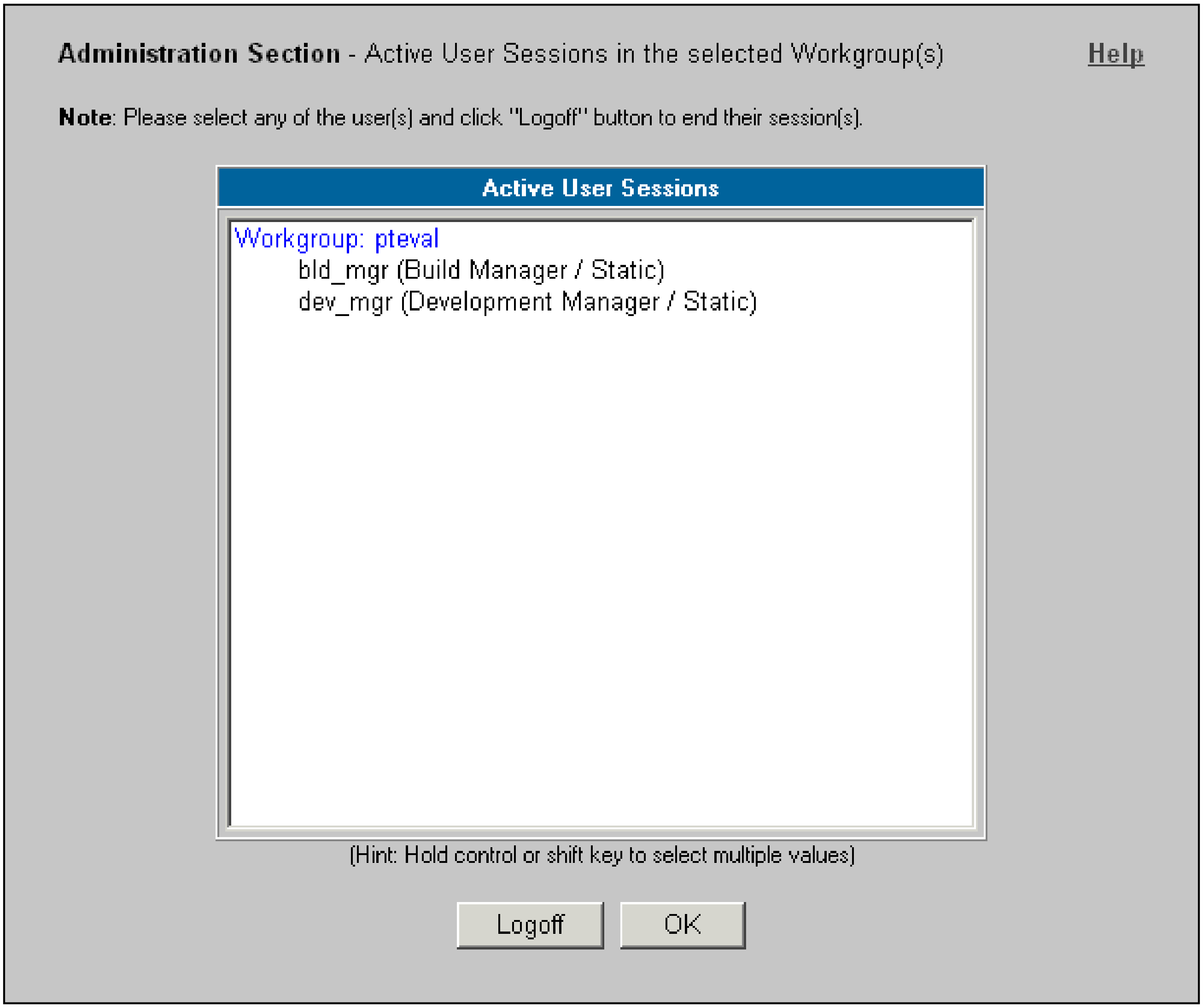
Logging Off User Sessions

You may wish to end the active user sessions for a workgroup.

To **logoff** any active user sessions for a workgroup:

1. Login to the Workgroup Management System
2. Click on the **Users** icon
3. Select the option called **Summary**, then click on the **Continue** button
4. Click on the radio button to the left of the workgroup for which you wish to logoff the active user sessions, then click on the **Logoff User Sessions** button at the bottom of the page
5. A list of all active sessions will be displayed. The user name, full name, and license type will be displayed for each session. To end a session by logging off a user, click on the user session to highlight it, then click on the **Logoff** button. By holding down the **CTRL** or **SHIFT** key on your keyboard, you can select multiple user sessions.
6. Click **OK** to confirm this operation.
7. Click on the **OK** button to return to the **Summary** section.

The figure below shows an example of the User Sessions list.


Administration Section - Active User Sessions in the selected Workgroup(s)
Help
Note: Please select any of the user(s) and click "Logoff" button to end their session(s).
Active User Sessions
Workgroup: pteval
bld_mgr (Build Manager / Static)
dev_mgr (Development Manager / Static)
(Hint: Hold control or shift key to select multiple values)
Logoff
OK

NetResults ProblemTracker

Synchronizing a User

Help Topics | << | >>

Users

When the profile information for users is modified using the Edit User operation, the information needs to be updated in the workgroups in which the user(s) has(have) been added.

To **synchronize** the user information in a workgroup:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the top button bar
3. Select the option **Synchronize User**, then click on the **Continue** button
4. Select a workgroup to be updated, then click on the **Continue** button
5. A confirmation message will be displayed when the operation has completed successfully. Click **OK** to return to the License Administration menu

NetResults ProblemTracker

User License Administration Operations

Help Topics | << | >>

Users

Each individual workgroup has a Administrator user configured to maintain the database and operations that pertain to a single workgroup. This section allows the Workgroup Management System Administrator to choose whether a workgroup Administrator can edit user account information.

To set the **General Option** to be applied to **all** workgroup Administrators:

1. Login to the Workgroup Management System
2. Click on the **Users** icon in the button bar
3. Select the option **Administration Options**, then click on the **Continue** button
4. Select the option to be applied to **all** workgroup Administrators (each option is described in detail below)
5. Click on the **Save** button to save your selection

Do not allow local workgroup administrators to edit user account information in their workgroup
This option, which is configured by default, does not allow the local workgroup Admin users to edit the user account information for any users. The user account information can only be modified in the Workgroup Management System or by the user in his / her Account Information section.

Allow local workgroup administrators to edit user account information for users in their workgroup that are not in any other workgroups
This option allows local workgroup Admin users to edit the user account information for any users who are only members of their workgroup (the user only has access to a single workgroup). Any users that match this criteria will have an **Edit** button to the left of the user account listed on the workgroup's User Administration table. This option is selected by default for new installations.

Allow local workgroup administrators to edit user account information for all users in their workgroup
When this option is selected, all local workgroup Administrators will be able to edit the user account information for any users added to their workgroup. An **Edit** button will be displayed to the left of all user accounts in the User Administration table.

NetResults ProblemTracker

Using Oracle 8i (or later) Database

Help Topics | << | >>

The following instructions apply to Oracle 8i (or later). Oracle is a professional RDBMS and by its nature is very complex. This document assumes that you are very familiar with the administration and use of Oracle. Please refer to the documentation included with Oracle for detailed instructions where necessary.

For questions regarding the use of Oracle, please contact Oracle Corporation technical support.

In order to use Oracle with ProblemTracker you must perform the following steps on the machine in which the Oracle Server is installed:

---

1. Update the Oracle Driver information (for Oracle 9i / 10g only)

If you are using Oracle 9i / 10g with ProblemTracker, you must enter the name of the Oracle ODBC driver into the Workgroup Management System. To do this, perform the steps listed in the Editing Common Parameters Help section. Then, proceed to the next step to Create an Oracle Database.

2. Create an Oracle Database

By default ProblemTracker uses a Microsoft Access database, however it can also be used with Oracle. Oracle database is a separately sold product available from Oracle Corporation and is not bundled with ProblemTracker.

To use ProblemTracker with Oracle, you must first create a database using Oracle. You can create a database of any name, although it is recommended that it matches the workgroup name. If your Oracle software is installed on a machine with a Windows-based platform, perform the following steps to create the database. If your Oracle software is installed on a Sun Solaris platform, click here for a different set of steps.

Oracle 8i on Windows platform:

1. Start the Oracle Database Configuration Assistant.
2. Select the option "Create a Database" and click "Next".
3. If you wish to have a standard Oracle database, select the option "Typical (recommended)" and

click "Next". But, if you wish to have the Oracle database use multinationalization, then choose the option "Custom" and click "Next" and continue with the installation.

4. Select the appropriate method (either copy existing files from the CD, or create new database files) for creating the database and click "Next".
5. Select the environment (either OLTP, DSS, or Hybrid/Multipurpose system) in which the database will operate and click "Next". The default and the recommended one is a hybrid system.
6. Enter the approximate number of users who will be concurrently connected to the database at any given time and then click "Next". If you are not sure, accept the default value.
7. Select the options you want to configure for use in the database and click "Next".
8. Enter the workgroup name (recommended) for the Global Database Name and the SID (System Identifier) or you can enter any valid database name. If you have chosen the option "Custom" in Step 3, then click the "Change Character Set..." button and choose the appropriate character set you need. Say if you wish to have "UTF8" character set, then choose "UTF8" for the options "Character Set" and "National Character Set" in the dialog and then click "Next".
9. Select the option "Create database now" and click "Finish". Click "Yes" to the confirmation dialog.
10. Creation of Oracle database will take few minutes depending on the options you have chosen to configure. Please wait until Oracle gives a confirmation stating that the database has been created and then note the Global Database Name, SID, SYS and SYSTEM account passwords in a safe place.

Oracle 9i on Windows or Sun Solaris platform:

1. Start the Oracle Database Configuration Assistant.
2. Select the option "Create a Database" and click "Next".
3. Select the option "General Purpose" and click "Next".
4. Enter the Global Database Name in the form "databasename.domain" and the System Identifier (SID) in the form "databasename", then click "Next". It is advised that you select the database name to match the workgroup name that you will be using. However, using a different name is acceptable.
5. Select the option "Dedicated Server Mode" and click "Next".
6. Select the "Custom" option.
7. If you do not plan to use multinationalization, skip to the next step. If you wish to have the Oracle database use multinationalization, then click on the "DB Sizing" tab. In the "Database Character Set" field, select "UTF8".
8. Click "Next". Click "Next" once more.
9. Check the option for the option "Create Database" and click "Finish".
10. Click "OK" to confirm the creation of the database.
11. Click on the button "Save as an HTML file" to save the database parameters, then click "OK" to proceed with creating the database.
12. After the database creation operation has completed successfully, click on the "Password Management" button to change the default password and unlock the database accounts of the new database.

Oracle 10g on Windows platform:

1. Start the Oracle Database Configuration Assistant. Click "Next".
2. Select the option "Create a Database" and click "Next".

3. Select the option "General Purpose" and click "Next".
4. Enter the Global Database Name in the form "databasename.domain" and the System Identifier (SID) in the form "databasename", then click "Next". It is advised that you select the database name to match the workgroup name that you will be using. However, using a different name is acceptable.
5. Check the option "Configure the Database with Enterprise Manager", and accept the default selection for other options and click "Next".
6. Enter a Password and Confirm Password for all accounts or you can enter different passwords and click "Next".
7. Select the storage mechanism as "File System" and click "Next".
8. Select the location of the Database files to be created. If you are not sure as what to choose, select the option "Use Database File Locations from Template" and click "Next".
9. Choose the recovery options for the database and click "Next".
10. Uncheck the option "Sample Schemas" and click "Next".
11. In the "Memory" tab, select the "Custom" option.
12. If you do not plan to use multinationalization, skip to the next step. If you wish to have the Oracle database use multinationalization, then click on the "Character Sets" tab. In the "Database Character Set" field, click "Choose from the list of character sets", and select "UTF8" from the list. Also select "UTF8" for the "National Character Set". Click "Next".
13. If you wish, you can review (and modify) the control file, data files and redo log groups for the database. Click "Next".
14. Select the option "Create Database" and click "Finish".
15. Click on the button "Save as an HTML file" to save the database parameters, then click "OK" to proceed with creating the database.
16. After the database creation operation has completed successfully, click on the "Password Management" button to change the default password and unlock the database accounts of the new database.

Now you have successfully created an Oracle database.

3. Create PROBLEMTRACKER user

ProblemTracker needs an Oracle user to access the Oracle database. Follow these steps to create an Oracle user:

1. Start the Oracle SQL*Plus.
2. Login into the newly created Oracle database as an user with proper privilege (CREATE USER system privilege) to create an user. For example, login as the SYSTEM user.
3. Type in the following commands in the SQL prompt in the same order:

   ```
   SQL> CREATE USER PROBLEMTRACKER IDENTIFIED BY PROBLEMTRACKER;
   SQL> GRANT CONNECT, RESOURCE TO PROBLEMTRACKER;
   ```

   After executing the above-mentioned two statements, you should receive a confirmation from Oracle saying that the user creation and the grant operation succeeded.

Now you have successfully created the PROBLEMTRACKER user and have granted proper privileges to it.

4. Configuring the Oracle Client on the Web Server (for remote Oracle servers only)

If your Oracle server is installed on a machine other than the Web Server, then you have to do the following on the Web Server in order to connect to the Oracle database and use ProblemTracker.

For Oracle 8i / 9i:

You have to to do the following to configure the Oracle client on the web server machine:

1. Start Net / Net8 / Net9 Configuration Assistant (or Net / Net8 / Net9 Easy Config Utility) that gets installed when you install the client.
2. Select the option "Create", give the workgroup name as the "New Net Service Name" and click "Next".
3. Select "TCP/IP (Internet Protocol)" and click "Next".
4. Enter the Oracle Server name as the "Host Name" and accept the default for the "Port Number" and click "Next".
5. Enter the workgroup name for the "Database SID" field and click "Next".
6. Click "Test Service".
7. In the new dialog, enter the username and password as PROBLEMTRACKER and click "Test". If the database and the PROBLEMTRACKER user are configured correctly, then a successful connection will be established. Click "Done" to close the dialog.
8. Click "Finish".

For Oracle 10g:

You have to to do the following to configure the Oracle client on the web server machine:

1. Start Net Configuration Assistant that gets installed when you install the client.
2. Select the option "Local Net Service Name configuration" and click "Next".
3. Select the option "Add" and click "Next".
4. Enter the newly created Oracle database name as the "Service Name" and click "Next".
5. Select "TCP" protocol and click "Next".
6. Enter the Oracle Server name as the "Host Name" and select "Use the standard port number" and click "Next".
7. Select "Yes, perform a test" and click "Next".
8. Click "Change Login".
9. In the new dialog, enter the username and password as PROBLEMTRACKER and click "OK". If the database and the PROBLEMTRACKER user are configured correctly, then a successful connection will be established. Click "Next".
10. Enter the newly created Oracle database name as the "Net Service Name" and click "Next".
11. Select "No" to configure another net service name and click "Next".
12. Click "Next" and click "Finish" to close the dialog.

Now you have successfully configured your Oracle client for the ProblemTracker workgroup. To complete the process of creating your Oracle workgroup(s), please complete the steps listed in the Adding a Workgroup section.

NetResults ProblemTracker

Database Administration

Help Topics | << | >>

Overview

ProblemTracker integrates with either Microsoft Access, Microsoft SQL Server, or Oracle databases using a standard OLE-DB interface. A Database Administration Utility is included with ProblemTracker to provide some basic operations (e.g. initialization) which may be required in order to use a database with ProblemTracker. **However, backups and other database administration should be performed using the tools that come with the database.**

Workgroup Management System

Regardless of the database type being used for the workgroups in your ProblemTracker installation, the Workgroup Management System is in Access format and must be backed up.

By default, the Workgroup Management System database file is located at:

***installDir/*ptadmin/Database/ptadmin.mdb**

where *installDir* is the directory where ProblemTracker was installed (by default, **C:\Inetpub\wwwroot\ProblemTracker**).

In addition, the User Management database is also in Access format and must be backed up.

By default, the User Management database file is located at:

***installDir/*ptcommon/Database/ptcommon.mdb**

where *installDir* is the directory where ProblemTracker was installed (by default, **C:\Inetpub\wwwroot\ProblemTracker**).

Microsoft Access Databases

By default ProblemTracker uses a Microsoft Access database file located at:

***installDir/workgroup/*Database/Bugtrack.mdb**

where *installDir* is the directory where ProblemTracker was installed (by default, **C:\Inetpub\wwwroot\ProblemTracker**), and *workgroup* is the name of the ProblemTracker workgroup that was installed. There is one database per workgroup.

It is recommended that you **back up the database file on a regular basis** (e.g. daily) and at a time when it is highly unlikely to be in use (e.g. early morning when backups are typically run). As with any other Windows file, if the file is open, it cannot be backed up until it is closed. ProblemTracker only accesses the database (opens the file) briefly to handle each request (it is only opened between the time a user clicks on a link or button and the requested web page is returned, it is not left open).

To back up your Access database, copy the file **installDir/versionDir/Database/Bugtrack.mdb** (as described above) for each workgroup.

You also need to back up the Attachments folder which is located at **installDir/workgroup/Attachments** for each workgroup.

Over time this file may become quite large. You can attempt to compact this file by using Microsoft Access 2000. It is strongly recommended that you backup the file before attempting this operation.

MS SQL Server Databases

If you are using ProblemTracker with a SQL Server database, please refer to the SQL Server documentation on recommended administration procedures, such as **regular scheduled backups**, etc.

There is one SQL Server database for each ProblemTracker workgroup. By default, the database name is the same as the workgroup name. If the database name is different than the workgroup name, the database name can be found by viewing a workgroup in the Workgroup Management System.

ProblemTracker uses a login with the name PROBLEMTRACKER to access these databases for ProblemTracker operations.

You also need to back up the Attachments folder which is located at **installDir/workgroup/Attachments** for each workgroup where installDir is the directory where ProblemTracker was installed (by default, **C:\Inetpub\wwwroot\ProblemTracker**), and workgroup is the name of the ProblemTracker workgroup that was installed.

Oracle Databases

If you are using ProblemTracker with an Oracle database, please refer to the Oracle documentation on recommended administration procedures, such as **regular scheduled backups**, etc.

There is one Oracle database for each ProblemTracker workgroup. By default, the database name is the same as the workgroup name. If the database name is different than the workgroup name, the database name can be found by viewing a workgroup in the Workgroup Management System.

ProblemTracker uses a login with the name PROBLEMTRACKER to access these databases for ProblemTracker operations.

You also need to back up the Attachments folder which is located at **installDir/workgroup/Attachments** for each workgroup where installDir is the directory where ProblemTracker was installed (by default, **C:\Inetpub\wwwroot\ProblemTracker**), and workgroup is the name of the ProblemTracker workgroup that was installed.

Direct Database Edits are Not Supported

Although ProblemTracker uses a standard database, it is recommended that you **do not directly modify** (or even open) **the database(s). Doing so may result in serious and perhaps unrecoverable damage to your ProblemTracker data.** Directly accessing the database may also lock users out of the system. Support is not provided for ProblemTracker installations in which the database(s) have been modified using anything other than the (unmodified) ProblemTracker web pages that are shipped with the product (unless you were directed to do so by NetResults Technical Support or NetResults Professional Services). If NetResults Technical Support discovers that your data has been directly modified (or your ProblemTracker web pages have been modified), they may require that you reinstall the product and reinitialize the database(s) before providing any further support.

Direct modification of a ProblemTracker database or source pages by users is not supported by NetResults.

NetResults ProblemTracker

Windows 2003 / XP / 2000 Time Zone Selection Chart

The following is a list of time zones that are supported by ProblemTracker when installed on a Windows 2003 / XP / 2000 system. Entries with (*) are only available in Windows 2003 and XP.

Time Zone Offset (in Hours)	**Time Zone**	**System Time Zone** (as displayed in Date/Time Settings)
-12:00	Dateline Standard Time	Eniwetok, Kwajalein
-11:00	Samoa Standard Time	Midway Is, Samoa
-10:00	Hawaiian Standard Time	Hawaii
-10:00	Alaskan Standard Time	Alaska
-08:00	Pacific Standard Time	Pacific Time (US & Canada); Tijuana
-07:00	Mexican Standard Time[La Paz](*)	Chihuahua, La Paz, Mazatlan
-07:00	Mountain Standard Time	Mountain Time (US & Canada)
-07:00	Mountain Standard Time [Arizona]	Arizona
-06:00	Central Standard Time	Central Time (US & Canada)
-06:00	Mexico Standard Time	Mexico City, Tegucigalpa
-06:00	Canada Central Standard Time	Saskatchewan
-06:00	Central America Standard Time	Central America
-05:00	Eastern Standard Time	Eastern Time (US & Canada)

-05:00	Eastern Standard Time [Indiana (East)]	Indiana (East)
-05:00	SA Pacific Standard Time	Bogota, Lima, Quito
-04:00	Atlantic Standard Time	Atlantic Time (Canada)
-04:00	SA Western Standard Time	Caracas, La Paz
-04:00	Pacific SA Standard Time	Santiago
-03:30	Newfoundland Standard Time	Newfoundland
-03:00	SA Eastern Standard Time	Buenos Aires, Georgetown
-03:00	E. South America Standard Time	Brasilia
-03:00	Greenland Standard Time	Greenland
-02:00	Mid-Atlantic Standard Time	Mid-Atlantic
-01:00	Azores Standard Time	Azores
-01:00	Cape Verde Standard Time	Cape Verde Is
00:00	Universal Coordinated Time	Casablanca, Monrovia
00:00	Greenwich Mean Time	Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London
+01:00	Romance Standard Time	Amsterdam, CopenHagen, Madrid, Paris, Vilnius
+01:00	W. Central Africa Standard Time	West Central Africa
+01:00	Central European Standard Time	Belgrade, Sarajevo, Skopje, Sofija, Zagreb
+01:00	Central Europe Standard Time	Bratislava, Budapest, Ljubljana, Prague, Warsaw
+01:00	W. Europe Standard Time	Brussels, Berlin, Bern, Rome, Stockholm, Vienna

+02:00	Egypt Standard Time	Cairo
+02:00	South Africa Standard Time	Harare, Pretoria
+02:00	Israel Standard Time	Israel
+02:00	E. Europe Standard Time	Bucharest
+02:00	FLE Standard Time	Helsinki, Riga, Tallinn
+02:00	GTB Standard Time	Athens, Istanbul, Minsk
+03:00	Arab Standard Time	Kuwait, Riyadh
+03:00	E. Africa Standard Time	Nairobi
+03:00	Arabic Standard Time	Baghdad
+03:00	Russian Standard Time	Moscow, St. Petersburg, Volgograd
+03:30	Iran Standard Time	Tehran
+04:00	Arabian Standard Time	Abu Dhabi, Muscat
+04:00	Caucasus Standard Time	Baku, Tbilisi
+04:00	Afghanistan Standard Time	Kabul
+05:00	West Asia Standard Time	Islamabad, Karachi, Tashkent
+05:00	Ekaterinburg Standard Time	Ekaterinburg
+05:30	India Standard Time	Bombay, Calcutta, Madras, New Delhi
+05:45	Nepal Standard Time	Kathmandu
+06:00	Central Asia Standard Time	Almaty, Dhaka
+06:00	Sri Lanka Standard Time	Columbo
+06:00	N. Central Asia Standard Time	Almaty, Novosibirsk
+06:30	Myanmar Standard Time	Rangoon
+07:00	SE Asia Standard Time	Bangkok, Hanoi, Jakarta
+07:00	North Asia Standard Time	Krasnoyarsk

+08:00	China Standard Time	Beijing, Chongqing, Hong Kong, Urumqi
+08:00	W. Australia Standard Time	Perth
+08:00	Singapore Standard Time	Singapore
+08:00	Taipei Standard Time	Taipei
+08:00	North Asia East Standard Time	Irkutsk, Ulaan Bataar
+09:00	Tokyo Standard Time	Osako, Sapporo, Tokyo
+09:00	Korea Standard Time	Seoul
+09:00	Yakutsk Standard Time	Yakutsk
+09:30	AUS Central Standard Time	Darwin
+09:30	Cen. Australia Standard Time	Adelaide
+10:00	AUS Eastern Standard Time	Canberra, Melbourne, Sydney
+10:00	E. Australia Standard Time	Brisbane
+10:00	West Pacific Standard Time	Guam, Port Moresby
+10:00	Tasmania Standard Time	Hobart
+10:00	Vladivostok Standard Time	Vladivostok
+11:00	Central Pacific Standard Time	Magadan, Solomon Is, New Caledonia
+12:00	Fiji Standard Time	Fiji, Kamchatka, Marshall Is
+12:00	New Zealand Standard Time	Auckland, Wellington
+13:00	Tonga Standard Time	Nuku'alofa

NetResults ProblemTracker

Windows NT 4.0 Time Zone Selection Chart

The following is a list of time zones that are supported by ProblemTracker when installed on a Windows NT 4.0 system.

Time Zone Offset (in Hours)	**Time Zone**	**System Time Zone** (as displayed in Date/Time Settings)
-12:00	Dateline Standard Time	Eniwetok, Kwajalein
-11:00	Samoa Standard Time	Midway Is, Samoa
-10:00	Hawaiian Standard Time	Hawaii
-10:00	Alaskan Standard Time	Alaska
-08:00	Pacific Standard Time	Pacific Time (US & Canada); Tijuana
-07:00	Mountain Standard Time	Mountain Time (US & Canada)
-07:00	Mountain Standard Time [Arizona]	Arizona
-06:00	Central Standard Time	Central Time (US & Canada)
-06:00	Mexico Standard Time	Mexico City, Tegucigalpa
-06:00	Canada Central Standard Time	Saskatchewan
-05:00	Eastern Standard Time	Eastern Time (US & Canada)
-05:00	Eastern Standard Time [Indiana (East)]	Indiana (East)
-05:00	SA Pacific Standard Time	Bogota, Lima, Quito
-04:00	Atlantic Standard Time	Atlantic Time (Canada)
-04:00	SA Western Standard Time	Caracas, La Paz

-03:30	Newfoundland Standard Time	Newfoundland
-03:00	SA Eastern Standard Time	Buenos Aires, Georgetown
-03:00	E. South America Standard Time	Brasilia
-02:00	Mid-Atlantic Standard Time	Mid-Atlantic
-01:00	Azores Standard Time	Azores
00:00	Universal Coordinated Time	Casablanca, Monrovia
00:00	Greenwich Mean Time	Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London
+01:00	Romance Standard Time	Amsterdam, CopenHagen, Madrid, Paris, Vilnius
+01:00	Central European Standard Time	Belgrade, Sarajevo, Skopje, Sofija, Zagreb
+01:00	Central Europe Standard Time	Bratislava, Budapest, Ljubljana, Prague, Warsaw
+01:00	W. Europe Standard Time	Brussels, Berlin, Bern, Rome, Stockholm, Vienna
+02:00	Egypt Standard Time	Cairo
+02:00	South Africa Standard Time	Harare, Pretoria
+02:00	Israel Standard Time	Israel
+02:00	E. Europe Standard Time	Bucharest
+02:00	FLE Standard Time	Helsinki, Riga, Tallinn
+02:00	GTB Standard Time	Athens, Istanbul, Minsk
+03:00	Arab Standard Time	Kuwait, Riyadh
+03:00	E. Africa Standard Time	Nairobi
+03:00	Russian Standard Time	Moscow, St. Petersburg, Volgograd

+03:30	Iran Standard Time	Tehran
+04:00	Arabian Standard Time	Abu Dhabi, Muscat
+04:00	Caucasus Standard Time	Baku, Tbilisi
+04:00	Afghanistan Standard Time	Kabul
+05:00	West Asia Standard Time	Islamabad, Karachi, Tashkent
+05:00	Ekaterinburg Standard Time	Ekaterinburg
+05:30	India Standard Time	Bombay, Calcutta, Madras, New Delhi
+06:00	Central Asia Standard Time	Almaty, Dhaka
+06:00	Sri Lanka Standard Time	Columbo
+07:00	SE Asia Standard Time	Bangkok, Hanoi, Jakarta
+08:00	China Standard Time	Beijing, Chongqing, Hong Kong, Urumqi
+08:00	W. Australia Standard Time	Perth
+08:00	Singapore Standard Time	Singapore
+08:00	Taipei Standard Time	Taipei
+09:00	Tokyo Standard Time	Osako, Sapporo, Tokyo
+09:00	Korea Standard Time	Seoul
+09:00	Yakutsk Standard Time	Yakutsk
+09:30	AUS Central Standard Time	Darwin
+09:30	Cen. Australia Standard Time	Adelaide
+10:00	AUS Eastern Standard Time	Canberra, Melbourne, Sydney
+10:00	E. Australia Standard Time	Brisbane
+10:00	West Pacific Standard Time	Guam, Port Moresby
+10:00	Tasmania Standard Time	Hobart
+10:00	Vladivostok Standard Time	Vladivostok

+11:00	Central Pacific Standard Time	Magadan, Solomon Is, New Caledonia
+12:00	Fiji Standard Time	Fiji, Kamchatka, Marshall Is
+12:00	New Zealand Standard Time	Auckland, Wellington

NetResults ProblemTracker

Frequently Asked Questions

Help Topics | << | >>

Our Frequently Asked Questions (FAQ) section is updated quite often. For the latest information, available 24 hours a day, 7 days a week, please browse to the Frequently Asked Questions in the ProblemTracker Support section of our web site. It has answers to many questions that are asked by our customers. It is likely that you will find the answer to your question or resolution (or workaround) to a problem in the FAQ.

NetResults ProblemTracker

Contacting NetResults

Help Topics | << | >>

If you are unable to resolve a problem after searching the ProblemTracker Frequently Asked Questions section of our web site, and you are evaluating the product or have a current support agreement with NetResults, please contact us via email. Standard support is available via email on business days (Monday through Friday, excluding holidays). You should receive a response within one business day. Additional support options (e.g. phone support, extended hours) may be purchased from NetResults. Phone support is not included with the product, it must be purchased separately.

For the appropriate support email address, standard support hours, and a list of information to send us for fastest resolution to your problem, please click here. If for some reason you are unable to reach our site via the web, please send your support email to

pt_support@NetResultsCorp.com or pt_support@n2r6.com

In your email please be sure to include the following information (emails with this information are generally given priority over those without):

1. Version of ProblemTracker you are using (e.g. 5.5, 5.0, 4.0).
2. Web Server software being used (e.g. IIS 6, IIS 5, IIS 4).
3. Database being using (e.g. MS Access, MS SQL Server 7.0, Oracle 8i/9i).
4. Operating System of the server on which ProblemTracker is installed (e.g. Windows NT 4.0 Workstation/Server, Windows 2000 Server).
5. Web Browser software being used (e.g. IE 5/6, Netscape 6/7).
6. **The full text of any error message which is displayed.** In many cases if you get a generic database error message, you can scroll further down on the page to find more detailed error information.
7. **The steps required to reproduce the problem.**
8. Whether you are an evaluator or licensed user with support.
9. Attach the following files from your installation to your message:
   - All files present in the installation log folder where you installed ProblemTracker. By default, the files can be found in C:\NetResultsPTLog.
   - If your problem is related to the Workgroup Management System, attach the file called ptadminlog.txt that can be found in the "pttmp" folder of your web server directory. By default, this file can be found at C:\Inetpub\wwwroot\ProblemTracker\pttmp\ptadminlog.txt.
   - If your problem is related to email notification messages, attach the file called emaillog.txt that can be found in the "pttmp" folder of your web server directory. By default, this file can be found at C:\Inetpub\wwwroot\ProblemTracker\pttmp\emaillog.txt.
   - For all other problems, attach all the files that can be found in the "pttmp" folder of your web server directory. By default, this directory can be found at C:\Inetpub\wwwroot\ProblemTracker\pttmp.

Please be as specific as possible in your description of what is wrong. Including steps to reproduce the problem and the full text of all error messages is very helpful and can significantly reduce the amount of time it takes to resolve a problem.