Release Notes

IssueTrak 9.0

Premise customers may download upgrade files and instructions from the home screen message in our Support Site. Hosted customers will be notified of pending upgrades via email.

Supporting *Administrator* and *User Manual* content will be available directly from any IssueTrak site running 9.0 with Online Help enabled. Customers may also download all available documentation from KB Article #62 of our Support Site.

What's been added...

Custom Issue Screens

Define your own included fields, field order and requirements for issue screens by issue type.

More Dashboard options

Display Open Issues by Subtype, Location, Region and Severity on the Dashboard.

More Home Page options

Use Summary, As Submitter, Assignee or Next Action reports from *My Issues* as a Home Page.

Login History option

Capture user login attempts, view login history from user records, display last login and link to login history from user Home Pages.

Email Distribution List Default

Define the standard events included when new members are added to Email Distribution Lists.

Enhanced Line Item functionality

Subtract Labor Hours from Service Contracts when adding Billing Module Line Items to issues.

Enhanced Documentation

Check out our ongoing documentation improvements! Expect more concise and easy-to-read information *with every release*, including examples, recommendations and best practices.

In case you are curious, a few quick comparisons are provided in the following tables.

Table 1: Comparison of "Users" topic, version 7.0 to version 9.0

<table>
<tr><th>What was once:</th><th>Is now:</th></tr>
<tr><td>
3-1 Managing Users and Groups

To use IssueTrak, you must log in. To log in, you must have a record in the User table. Once you are logged in, IssueTrak knows who you are, so when you submit an Issue, add a note, or complete a task, IssueTrak updates the appropriate records with your User ID.

You can set up Groups in IssueTrak, and put Users into Groups. Then you can assign rights to a Group without having to grant rights to each individual user. In addition, you can assign an Issue to a Group instead of to an individual. When this happens, all users within the Group will receive an email notification.

Adding a New User

Choose Users from the Administration menu, and then choose Add User. Complete the required information on the data entry screen. Select the appropriate User Attributes (discussed below) for the User and click Add User to save the new record.

User Type is either "User" or "Template". A type of "User" is what you choose most often. The "Template" user type allows you to set up a user record with default attributes that can be easily cloned. "Template" users do not login to the IssueTrak.

The User ID and Password fields do not require an entry. However, users who actually need to login to IssueTrak must be assigned a User ID and Password for system access. If the User ID field is left blank, IssueTrak will assign a sequential numeric ID for the User record. In all cases, the First Name and Last Name fields are REQUIRED.

NOTE: Passwords are encrypted in IssueTrak.

The entry in the Display Name field is what shows on IssueTrak screens and drop-down lists. To display a sorted drop-down list, enter data in the Display Name field using the default format specified. For example, if the Display Name format is currently set to Last, First enter "Jones, John".

NOTE: The Display Name field can be left blank. By default, IssueTrak will create a Display Name by combining the entered first and last names to satisfy the default format. The Display Name format can be specified in System Settings.

There are five Parameters that can be checked:

Active — Normally checked. Active users will show up in various lists of users, and are counted for licensing purposes. When employees leave, it is usually better to mark
</td><td>
Users

This chapter covers...
▪ What are users: user defined fields, attachments, permissions and memberships
▪ User administration options: summary, list all, clone, search and user defined fields
▪ Getting started: setting up entities, user-defined fields and user templates
▪ Maintaining users: adding and editing

What are users?

Any individual that needs to interact directly or indirectly with your IssueTrak system is a "User." Users that can login to your IssueTrak site may interact directly. Users that cannot login may interact indirectly through other users and/or email.

Your users can be manually added from:
▪ Administration > Users > Add
▪ Administration > Users > Clone
▪ Submit Issue screen
▪ Login screen using the Self-Registration feature

They can also be automatically added through authentication and imports from Active Directory (AD) using the AD Module as well as incoming email messages using the Incoming Email (IEM) Module.

Users are added by creating "User Records" that may include:
▪ Basic details – user ID, password, name, email, phone, address and time zone
▪ Additional details – other information stored in "User Defined Fields"
▪ "Attachments" – documents of any electronic file format
▪ "Permissions" – what the user can see or do using IssueTrak
▪ "Memberships" – any larger entities the user belongs to
</td></tr>
</table>

Table 2: Comparison of "Recurring Issues" topic, version 7.0 to version 9.0

<table>
<tr><th>What was once:</th><th>Is now:</th></tr>
<tr><td>
17-1 Recurring Issues

IssueTrak provides functionality for scheduling Issues which require action on a daily, weekly, monthly, or one-time basis. In the Recurring Issues section, users can list, search, and create recurring Issues, as well as clone recurring Issues from existing Issues. The following sub-sections provide instructions for the aforementioned functions.

List All

This feature allows users to view all of their associated Recurring Issues. The interface displays details for each Issue's name, date created, schedule, end schedule, and most recent date the Issue occurred. Additionally, from this page users can edit or delete their Recurring Issues.

The following table provides brief descriptions for each display field.

<table>
<tr><th>Display Field</th><th>Description</th></tr>
<tr><td>Issue Name</td><td>Name assigned to the Recurring Issue. The name is displayed as a link to editing the recurring properties.</td></tr>
<tr><td>Created On</td><td>Date that the Recurring Issue was created.</td></tr>
<tr><td>Schedule</td><td>Frequency of repetition.</td></tr>
<tr><td>Schedule Ends</td><td>Termination date of the Issue's recurrence.</td></tr>
<tr><td>Last Issue Created</td><td>Date that the Issue last occurred within its schedule.</td></tr>
</table>
Search

The Search feature allows users to enter filtering criteria to their list of Recurring Issues. Following is a list of fields to search against.

<table>
<tr><th>Search Field</th><th>Description</th></tr>
<tr><td>Issue Name</td><td>Restricts search to an exact phrase or word in the Recurring Issue name</td></tr>
<tr><td>Subject</td><td>Restricts search to an exact phrase or word in the Recurring Issue subject</td></tr>
</table>
</td><td>
Recurring Issues

This chapter covers...
▪ What are recurring issues?
▪ Maintaining recurring issues: adding, editing and searching

What are recurring issues?

Your system can automatically submit issues on a scheduled basis through "Recurring Issues." You may pre-define the Subject, Description, Issue Type/Subtype(s), Assigned To, Tasks, Email Distribution List, etc. for any of these issues.

Recurring issues may include issues that need to be addressed at routine intervals, such as daily, weekly, bi-weekly, monthly, quarterly, annually or bi-annually. They may also include issues that need to be addressed at a future date.

Examples...
Create a recurring issue for "Employee Reviews" on a quarterly or annual basis.
Create a recurring issue for "System Backups" on a daily or weekly basis.
Create a recurring issue for "X Product Support Renewal" to occur next June 15th.

While recurring issues are most commonly created from scratch based on known activities that need to occur, they can also be created based on open or closed issues that reveal otherwise unknown activities that need to occur.

Examples...
Use an issue submitted by a customer that has been handled inappropriately to create a recurring issue for "Customer Follow-up" to pro-actively ask how they are doing and if you can be of any service in one month.

Use an issue submitted because employees cannot print from a network printer because the printer is out of toner to create a recurring issue to "Check/Replace Toner" on this printer every other month.
</td></tr>
</table>

What’s been resolved…

Miscellaneous

#33742 – Project name with special characters displayed incorrectly on issues

#33099 – Group name with special characters returns error on Submit and Copy

#32025 – Service Contract options not populating from Caller value on Submit screen

#33390 – Start or Stop Time of 12:00PM returns message Service Contract hours exceeded

#32219 – 1st Response Time not persisting after edit of issue

#32443 – Article attachments not displayed using KB Anonymous Access

Administration

#33279 – Query filtered by date value returns error on Mass Update

#32485 – Organizational Administrator limited when member of “Internal Only” organization

#32962 – Project value update not persisting after edit of Quick Pick

#33139 – Home Page in default template not persisting after user Self-Registration

Email Notifications

#32098 – Email to initiator not sent on submit when user is both Submitter and Assignee

#32842 – Links return error in Project Reminder email notifications

Reports

#32415 – Organization name with special characters not displayed in popup on Issue Search

#33152 – User-defined field value with special characters returns error on Issue Search

#33314 – Detailed Export to Excel returns error from rich text and notes over 7000 characters

#32944 – Task List displaying issue count instead of task count from Issue Search

#33226 – Target and Required By Date displaying in server instead of user time zone

#33534 – Filter by SLA Compliance value returns error on Queries

#32563 – Group or sort by SLA Compliance value returns error on Reports

#31908 – Group with no email address not displayed in popup for Scheduled Report recipient

#32337 – Scheduled Reports Log returns error after edit of log settings

Active Directory Module

#32650 – UserID with special characters returns error on manual edit or delete of user record

Asset Management Module

#32302 – Audit history not displayed from popup for asset view on issues

#32621 – NIC duplicating on PC asset added manually with only IP address after edit of asset

Incoming Email Module

#32818 – Loop prevention settings applied to all mailboxes instead of individual mailboxes

Survey Module

#32092 – Blank count of closed issues setting returns error on Submit and Close

#32238 – Embedded HTML not displayed after installation of 8.0.2

#32717 – Respondents misspelled on Option screen

#32754 – Open-ended text with special characters displayed incorrectly in responses

#33680 – Exporting results returns error when Date Completed included

System requirements

- Windows Server 2000 or 2003
- Pentium III or above/1.8 GHz Processor
- 1 GB RAM
- SQL Server 7.0, 2000, 2005 or 2008 (Standard or Enterprise Edition)
- IIS 5.0 or 6.0

Technical support

Technical support is available through our Support Site at http://support.issuetrak.com or via email at support@issuetrak.com. Our Support Team is also available by phone at 757-213-1351, Monday through Friday, 7:00 AM to 8:00 PM (ET/GMT-5).