End User Guide

The ExtraView User Guide provides information on all the end-user topics of the ExtraView web-based issue tracking system. This online guide is aimed at end-users of ExtraView and can be used to complement the individual solutions guides. All the common information required to use ExtraView is within this guide, including how to navigate around the product, how to add and update issues, how notification works, and how to get the most out of reporting and querying.

Downloadable PDF

<u>The End User Guide is downloadable as a single PDF by clicking here</u>. You will need the <u>Adobe Acrobat</u> <u>Reader</u> to view this.

Introduction

ExtraView is a Web-based business process management system designed for organizations that need to track product and service issues, manage product requirements, improve team communication, and increase the efficiency of core processes. It is especially powerful in meeting the needs of applications in regulated industries, where a high degree of audit capability is needed.

This document covers the use of ExtraView in a number of pre-configured solutions. Note that all administrative functions are covered in the ExtraView Administration Guide. This guide covers the end-user aspects of using ExtraView. The version of ExtraView that you install may or may not include pre-configured solutions. These solutions can most often be downloaded from the ExtraView web site. You may use any or all of these unchanged, or you may alter the functionality of an individual solution, or you may turn off any unneeded pre-configured solution (the administrator uses the Grant Security Privileges function in the Administration section to do this). In addition, the administrator may also create new tracking systems, named Business Areas. Sample Business Areas include tracking systems for the following types of systems:

- Bug Tracking
- CAPA
- Knowledgebase
- Customer Support
- Feature Requests
- Helpdesk
- Task Management
- Adverse Event Reporting
- Safety Issue Tracking

Linking worldwide functional teams, ExtraView collects and routes requirements, defects, customer support calls, trouble tickets, and enhancement requests into one easy-to-use Web-based system. ExtraView represents and enforces your workflow and processes without the need for expensive

programming and time-consuming setup. ExtraView's intuitive operability and easy customization allows developers, engineers, quality assurance personnel, and others to devote their time to resolving immediate product development issues instead of spending their time implementing and maintaining costly, unwieldy, or poorly integrated internal tracking systems. In addition to creating and maintaining internal processes and workflow for greater efficiency, ExtraView can also empower your customers and partners. ExtraView makes it easy to provide limited data views so that customers and other outside users can submit issues, track issues, and verify resolutions without compromising the security of internal issues.

The Issue

This guide will often refer to an *issue*. An issue may be an issue, ticket, defect, customer support call, help desk record, or any other type of item stored in the ExtraView database.

Getting Started

Prior to signing on to ExtraView, there are a few simple things you must know, in order to successfully take advantage of the many features.

Screen Resolution

The resolution of your desktop monitor or screen on which you use ExtraView should be a minimum of 1280 x 1024 pixels. While ExtraView will work within your browser at lower resolutions than this, you may have to scroll up, down and sideways more than you would like. Note that it is an individual preference to select the size of font you want to view within your browser. If you are using ExtraView's Workspace feature, it is useful to have a minimum screen resolution of 1600 x 1200 or greater.

Supported Browsers

The list of supported browsers can be found here.

Never Use the Browser "Back" and "Refresh" Buttons

Your browser's "back" and "refresh" buttons do not work within ExtraView. Only navigate by the buttons that are displayed on ExtraView's menus. The reason is that ExtraView must maintain integrity of its information at all times. For example, if you press the button on ExtraView's Add Issue screen to add a new record to the database, then press the back button and press the add button again, you will have two records inserted. This is obviously a problem! Similarly, your process to update records may involve a workflow that can be disrupted, if you press the browser back button after a step has been taken.

Turn on Cookies in your Browser

Most browsers have cookies turned on as a default setting. However, if they are not turned on, you must turn them on in order to use ExtraView. ExtraView will warn you if cookies are not turned on, and will not function. Most browsers will work without problem with ExtraView.

To Turn on Cookies in Internet Explorer

- Select Internet Options from the Tools menu on your browser
- Click the **Security** tab
- Click the Custom Level button
- Set Allow cookies that are stored on your computer to Enabled
- Set the Allow per-session cookies to Enabled
- Click the **OK** button on the two open screens.

Turn on JavaScript

Most browsers have JavaScript turned on as a default setting. If they are not turned on, you will need to turn them on in order to use ExtraView. ExtraView will warn you if JavaScript is not turned on.

Turn on JavaScript in Internet Explorer

- Select Internet Options from the Tools menu on your browser
- Click the Security tab
- Click the Custom Level button
- Set the all of the Scripting options to Enabled
- Click the **OK** button on the two open screens.

Character Sets within your Browser

ExtraView must work consistently with a single character set, in order that information entered within different browsers across an organization will be compatible, and can be stored on and retrieved from the ExtraView server in a consistent manner. This is less of a problem with languages based on the Roman alphabetic, but is an essential ingredient of correctly configuring a system where users use double-byte languages such as Japanese and Chinese. Your system administrator will have decided on the character set your installation will use. Most likely, this will be a character set named UTF-8, which is universal and supports all languages. You should check that your local browser is set to the value. Your administrator will inform you if this should be changed to a different value.

Note: It is strongly recommended that HTTP_CHARSET is set to a value of UTF-8, and that all users only set their browser character set to UTF-8, so that characters will be displayed correctly and consistently.

Hardware Considerations

As long as you have configured your browser and other software as described above, ExtraView should work satisfactorily on you computer. However, if you make extensive use of workspaces, with a combination of multiple workspaces and many open panels within your workspaces, it benefits having faster, and/or multiple CPUs, plus a significant amount of memory. Browsers are more efficient in this environment, and will provide a speedier response.

ExtraView Functional Highlights

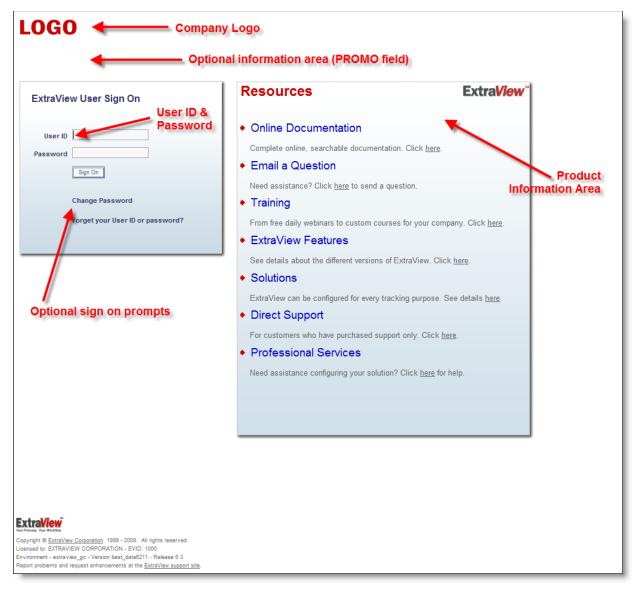
Tracking and reporting is the heart of ExtraView's user functionality. The following list highlights some of ExtraView's most important tracking and reporting features. Note that not all of these functions may be available to every user, as the ExtraView administrator is able to precisely control which features each user

has the ability to access.

- Simple, flexible, and customizable Web-based interface
- Unlimited scalability of the number of issues, customer support and other issues, user roles, users, fields, business rules, reports, and attachments
- Ability to split issues into multiple parts for individual tracking
- Ability to group related issues together, either within a single tracking area, or across multiple tracking areas
- Perform mass updates to the entire group of issues
- Automatic email notifications containing customized content
- Threaded email discussions of issues
- Ability to impose business rules and processes on the issues you enter as they move from initiation to closure
- Dynamic interest lists to notify users of changes to cases and specific events
- Ability to perform queries with either simple or complex filters
- Produce custom statistical and summary reports from any Web browser, and export to PDF, MS Word, MS Excel, or text
- Charting of results
- Complete audit trails on all updates and workflow transitions with analytical, statistical, summary, and historical issue-change reporting
- Ability to keep cases private for specific groups of users or publish to a larger community
- Integrated knowledge base
- Quick data entry using pre-defined forms
- In-depth detailed reporting at any drill-down level, including the ability to design reports that are available system-wide or only for your own use
- Ability to share filtered data with customers

User Sign On Screen

ExtraView is secure. Before all users can use ExtraView, they must sign on by supplying a valid combination of a user name and password.



ExtraView User Sign On screen

ExtraView has a set-up option that allows the Administrator to assign a user name and password to individual users or else allows the user to self-register (user self-registration will be discussed in a later section). If this option is turned on, there will be an additional self-registration prompt on the user Sign On screen.

There may be other options on this screen, for example allowing you to immediately send an email to your system administrator when you need help.

When you type the ExtraView Web address into your browser (as provided by the administrator) you are asked to enter your user name and your password in the spaces provided. You may change your password at this time, by clicking on the link at the bottom of the screen. If you enter either an invalid user name or password, you are prompted to try again.

Note the Product Information area on the sign on screen. Your administrator may have turned this off, or may have replaced the information with different contents. If this information is being sourced from ExtraView Corporation's servers then the information in this area will be altered from time-to-time.

If you see a message in red within the copyright section at the bottom of the screen, this has three potential causes:

- Not eligible for support from ExtraView Corporation Your company's support contract has lapsed. You are able to continue using ExtraView, and can continue to add new users to the system. You are not able to upgrade your system until you have obtained a new support contract from ExtraView Corporation
- Not eligible for support from ExtraView Corporation or this installation has an expired evaluation license You are able to continue using ExtraView. You are not able to upgrade your system until you have obtained a new support contract from ExtraView Corporation
- Unmatched Schema You have not completed an update or upgrade to your system. New code has been applied, but the database has not been updated.

Sign On to ExtraView

- Enter your user ID in the field labeled User ID
- Enter your password in the field labeled Password
- Press the **Sign On** button or press the **Enter** key on your keyboard and you will now see your personal ExtraView Home Page.

Note: If your company uses a mechanism known as Single Sign On, then you may be instructed by your administrator to use a different sign on sequence.

ExtraView User Sign Off

After you click the **Sign Off** button on the main ExtraView navigation menu, you are returned to the ExtraView User Sign On screen.

You now have the opportunity to:

- Sign on to ExtraView using a different user name and password
- Sign on to ExtraView using the same user name and password
- Self-Register as a New User, if this option is enabled by your administrator
- Change your password
- Point your browser to a different Web address and navigate away from the ExtraView environment

Password Expiration

The Administrator may require you to change your password, in which case you will be prompted to provide your old password plus your new password when signing on.

The Administrator may also have set an option that automatically expires your password after a set period. When this period is reached, you will also be asked to provide both your old password and a new password.

In both cases described above, you will have to re-enter your password after changing your password, in order to gain access to the system.

Changing Your Password

As mentioned above, you may be required to change your password or else you may simply wish to change your password periodically.

- Click the Change Password link on your ExtraView Sign On screen
- Enter your information on the Change Password screen
- Click the Update button.

Update Cancel Print Page	Change Password
User ID	
Current password	
New password	
Confirm new password	
Update Cancel Print Page	

Change Password screen

Forgotten Passwords

If there is link on the sign on screen with the text **Forget your User ID or Password?**, then clicking this allows you to reestablish your sign on credentials. You will see a screen like this:

Proceed	Cancel Print Pag	Forgotten P	assword
Wh add 24	en you confirm your Iress, with a link tha	D Reset your Password User ID or your email address, an email will be sent to your primary email allows you to reset your password. This link will remain active for a period of a take immediate action to restore your access.	
Proceed	Cancel Print Pag	3	

Forgotten Password / User ID Screen

You must be able to enter your valid User ID or your email address. Once you have done this, the ExtraView server will send you an email with a link that allows you to reset your password. This link must be used within 24 hours, and it can only be used a single time before it expires.

Self-Register As a New User

You only need to self-register to use ExtraView if your Administrator has not assigned you a user name and password. If your Administrator has disabled this option, it will not appear on your screen. If you selfregister as a user, an email is sent immediately to the administrators of ExtraView, to confirm your registration.

v User Sign On	Resources	Extra View *
	Online Documentation	
	Complete online, searchable documentation. Click here.	
	Email a Question	
_ /	Need assistance? Click <u>here</u> to send a question.	
ge Password Jser Registration	Training	
et your User ID or password?	From free daily webinars to custom courses for your company.	Click here.
	ExtraView Features	
	See details about the different versions of ExtraView. Click her	<u>e</u> .
	Solutions	
	ExtraView can be configured for every tracking purpose. See d	etails <u>here</u> .
	Direct Support	
	For customers who have purchased support only. Click here.	
	Professional Services	

ExtraView Sign On screen

Enter your personal details and your personal options on a screen similar to the one below:

Submit Cancel Print Page	Add new user
Basic Information Personal Options	Notification Options
User Information	
User ID ?	
Alternative User ID ?	
First name	
Last name	
Password ?	
Verify password	
Primary email address	
Job title	
Address	
City	
State / Province	
Zip / Postal code	
Country	
Work phone	
Home phone	
Cell phone	
Fax	
Pager	
User field 1	
Submit Cancel Print Page	

Add New User screen

- You can press the tabs at the top of the screen to move to enter your personal details, personal options, your report options and your notification options
- You can return to this screen at any time, as long as your administrator has given you permission. This is achieved from the main pull-down menu seen at the top of most pages once you have signed onto ExtraView
- Once you have entered all of your information, click the Update button.

Note: The highlighted fields (usually shown in bold or in a different color) are required, while the other information is desired, but optional. The Administrator will have decided which fields are optional and which are mandatory for your installation. Remember that you will not be able to receive ExtraView Email Notification unless you type in a valid Email address.

Note: If you self-register in ExtraView, you may not get a wide range of privileges. The Administrator normally allows self-registering users to only see and access a minimal amount of information. You should contact the Administrator if you require a higher level of access.

Conditions that sign you off from ExtraView automatically

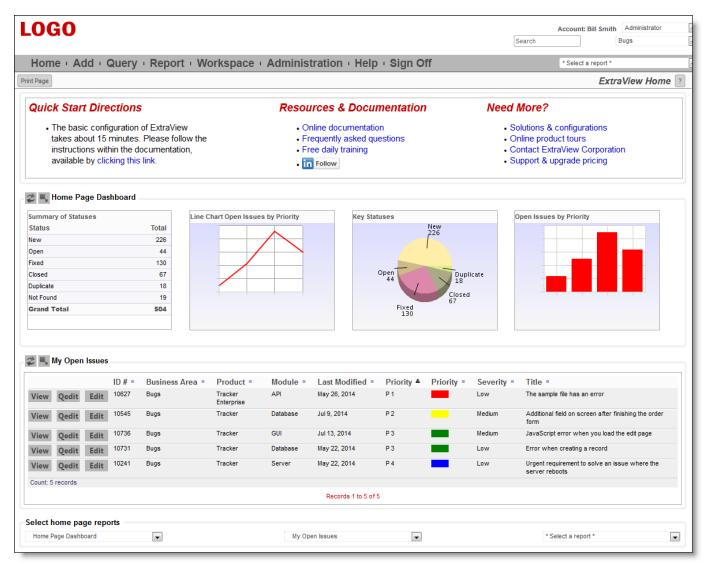
The most common reason that ExtraView will sign you off automatically is that your administrator has set an expiry period on the length of time for which you may remain idle and still remain signed on. If you are idle (you do not submit a request or a form to the server from your browser) for more than this period, then ExtraView will only allow you to continue after signing on again. The principal reasons for the administrator setting this are for security and to make most efficient use of the ExtraView licenses that your organization has purchased. These licenses may be shared amongst many people. When ExtraView signs you off automatically, you are asked to re-enter your user ID and password to continue working. When you were signed off the system by ExtraView, the alert shows a **Session expired or removed** message, by Administrator followed by the code.

Alert Code Meaning

- RC1 The referenced session no longer exists. The most likely reason is that the user was idle longer that the time allotted by the system administrator and the user was automatically signed out of the system. This condition may also be caused by the administrator restarting the server while you were in the middle of a task
- RC2 The cookies returned by the browser don't match session cookies held on the server
- RC3 The session expired in the foreground
- RC4 The session was removed by administrator
- RC5 Your IP address changed during the session and this is disallowed by the system administrator. Normally ExtraView performs a check for security purposes, to ensure that your IP address remains consistent. However, this check can be disabled if you part of a network where your IP address is automatically translated for any reason. This is most often seen when accessing a corporate network via a VPN or proxy server.

Standard Interface

The ExtraView standard interface is a traditional web-based menu system, with a navigation bar that provides access to all the key user functions. The functions are accessed one-at-a-time, screen-by-screen. This is in contrast to the ExtraView workspace interface which, in addition to a navigation bar, provides a complete windowed interface, with as many open panels as are required by the user. Between many of the panels, you can interchange data with convenient drag-and-drop. The standard interface is typically used for straightforward processes where users carry out a single task at a time. The workspace interface is a tool that lends itself to multi-tasking where users might need to quickly move between different tasks, or where users require the power of a windowed interface with drag-and-drop capability.



A typical home page

Navigation Bar

The ExtraView main navigation bar appears at the top of most screens throughout the application. It allows instant access to the main functions of ExtraView. The navigation bar may be customized to any one of a large number of themes, so the following screenshots are representative of the functions as opposed to the color, size and location of the elements. Not all of the elements may be present in your installation as they depend on permissions and the configuration that your administrator has created.



Navigation Buttons

This list shows the standard buttons within the navigation bar. Your administrator may have configured different buttons, with different purposes on the navigation bar. This includes the presentation of a

navigation bar that has "drop-down" selections.

- Home: The user's personal Home page
- Add: Allows users to enter new issues into the database
- Query: Allows users to search the database
- Search: Allows users to create and run reports
- Workspace: Opens a workspace window where you can perform many ExtraView tasks in a single window
- Admin or Administration: Allows Administrative users to configure ExtraView for the entire organization. As a user you may not have access to this area of ExtraView Help: Allows users to access ExtraView's online help system
- Sign Off: Click the Sign Off button to log out and return ExtraView to the Sign On screen.

Other Elements

Drilldown Box: This is a Search box that allows you to enter either keywords or issue ID's to retrieve matches. The following rules apply:

- You may enter a single issue ID, or multiple issue ID's. Separate multiple issue ID's with a semicolon character. If there are no results, ExtraView will attempt to treat the issue ID's as words and look for these as text
- You may enter any single word or multiple words. ExtraView treats these as Quickfind queries and fetches the results
- If you start your entry with a # character, then the search can be complex. Please see the <u>Quickfind</u> <u>documentation</u> for full instructions

Account: Your name that you are signed on with appears on the navigation bar. This is also a link to your personal options. Clicking on your name accesses your personal options

Roles: Provided you have access to more than one user role, you will see a select list which contains all the roles you may adopt. When you select a new role, you are taken to the Home Page, and your role is reset

Business Areas / Projects: Provided you have access to more than one Business Area and/or Project, you will see a select list which contains all the Business Areas and Projects you may adopt. When you select a new Business Area and/or Project, you are taken to the Home Page, and your current Business Area and/or Project is reset

Report List: If your administrator has turned this feature on, you will see a list of public and personal reports that you may run. Simply select the report you want to run from the list and a new window will open with the results of the report

Menubar: This is a set of buttons that will alter as you alter the page you are viewing in ExtraView. It will offer a range of options that is relevant to the screen you are looking at.

Note: Button names and the name of the ID within the ExtraView Menu frame may be altered to reflect your company's terminology. Your Administrator can also choose to display the ExtraView Menu as a horizontal screen menu, if this is preferred.

Personal Options

Click on your name in the navigation bar to access your personal options on the the **Change a user's details screen**. See <u>this page</u> for details on how you manage your personal options.

Roles

On the navigation bar, you may also have a list of roles that are available for you to adopt. This list of roles is the ones that the administrator allows you to adopt for different purposes. For example, you might have several roles, each corresponding to the use of a different Business Area. Simply click on the role you wish to adopt. If you have only been enabled for a single role, you will not find any links on this list, and you will not be able to change your role.

Business Areas and Projects

If this is enabled as an option on your navigation bar, then this list offers you the ability to move into a new Business Area and a corresponding Project. Depending on the configuration, you may or may not see this select list, or you may only see Business Areas and not Projects. The only Business Areas and Projects which will be visible will be those to which the Administrator has granted you access.

Reports

There may also be a list of reports that you can run from the navigation bar. If this is present, simply select a report from the list and this will be run immediately.

Home Page

The Home Page presents the following sections to you:

- Navigation Bar Key options to access features of ExtraView and to access your personal options and to change your Business Area and to change your role
- Sign On Message A message area that your system administrators uses to communicate with you
- Home Page reports Up to three reports can be displayed. By the title of each report, there are two buttons, one to refresh the report and the second to allow you to drill down and open up the report in another window. If the report was saved to output to a format other than the browser, it will appear in that output format. For example, a report that was saved to send its output to Microsoft Word will open the drilldown report within Microsoft Word
- Optional access to a knowledge base. This will be configured by your administrator.
- Optional access to shortcut buttons. This will be configured by your administrator.

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uick Star	t			Resources & Do	cumentation		Need Mo	re?	
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W			98	Bugs	Home Page	24	98	150	
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Typical home page

Mobile Interface

The mobile interface allows one or more ExtraView installations to be accessed from your mobile phone or tablet.

Installation on Apple Mobile Devices

Download and install ExtraView from the Apple Apps store. There is no cost for the app.

Installation on Android Mobile Devices

Download and install ExtraView from Google Play. There is no cost for the app.

Features

The key features of the mobile clients are:

- ExtraView recognizes a valid sign on from an authorized user, and will display the most appropriate screens for the device. For example, if you sign on from a phone, layouts designed specifically for small screens will be displayed. If you sign on from a tablet, a layout designed specifically for a medium-sized screen will be displayed, and, of course, if you sign on from a desktop computer with a browser, layouts designed for desktops will be displayed
- Data entry screens, such as the *add* issue and the *edit* issue screen have optional features, to allow the user to page through forms that might contain many, many fields on a desktop layout. Your administrator will have broken down the workflow into discrete steps, allowing bite-sized chunks to be handled on each small screen that is presented to the user. The user can simply move back and forwards between these pages
- There will typically be a customized navigation bar on a mobile installation, making it quicker and easier to reach the screen or report you wish to utilize
- Assuming your administrator has given permission, your User ID and password that you use on the sign on screen may be stored to save you re-entering the information each time you access ExtraView
- ExtraView interacts with local facilities on your mobile device, such as a camera and the photo album. You can take photographs directly from within the ExtraView app and upload them into image fields, document fields or attachments
- From your desktop computer, you can decide which reports you want to have available on your mobile device. There may be thousands of reports that you can run on your desktop computer, and this number would be impractical to work with on your mobile device, so there is the ability to be selective in which reports you access on your mobile device.

Limitations

The following are limitations of the mobile interface to ExtraView. Future versions will relax some of these:

- There is no ExtraView administration support within the mobile interface
- Uploading non-image file attachments is not supported on Apple iOS devices, because Apple mobile

devices do not allow access to their file system to upload files

- Report editors are not supported. You should use a desktop client to create and modify reports
- There is no Query mode with the mobile version. However, you can use the **Search** navigation menu entry to query for most items and you may create reports with runtime filters to emulate much of the query functions
- These report types are not supported, principally because they are highly interactive and there is insufficient space on a mobile screen: Calendar; Planning; Dashboard; Custom URL; Container reports
- Quickedit on column reports and Quicklists is not supported
- The record selector on Quicklists and column reports is not supported
- Drilldowns on charts are not supported
- Workspaces are not supported
- In general, operations which require a popup window within a screen are not supported. Where possible, the mobile device will bring up a new screen, and then return to the original screen after the operation that required a popup is complete
- Accessing the history or audit trail of an issue is not supported
- Date fields on *add* and *edit* screens are always presented in the medium format, with time
- Some workflow elements such as modal popup windows are not supported.

The Navigation Menu

The Navigation menu has been configured by your site administrator to give you access to the appropriate functions to which you have permission. It might look something like this:



Click on each section of the menu to open it and see what your site administrator has configured. It is likely that all installations have the **Search**, Account and the **Sign Off** entries.

If you configure a Home Page report for your mobile working, then a **Home** entry will appear on the navigation menu. Clicking this will run and display the nominated report. The Home Page report is also displayed when you sign on. To set up the Home Page report, use a desktop browser and navigate to the REPORT OPTIONS tab on your personal options screen. Select one of the available reports and update your account.

The **Search** input allows you to search for one or more keywords or one or more issue ID's within your database. If you're searching for more than one keyword with the fields of an issue, separate the words with spaces. If your're searching for multiple issue ID's separate them with semi-colons.

The **Account** entry allows you to alter your role and your current Business Area, providing your site administrator has given you permission to these functions:



The Sign Off entry ends your session and returns you to the Sign On screen.

If you click on the **Personal Options** menu entry, you are asked for your password, then you are taken to a screen similar to this:

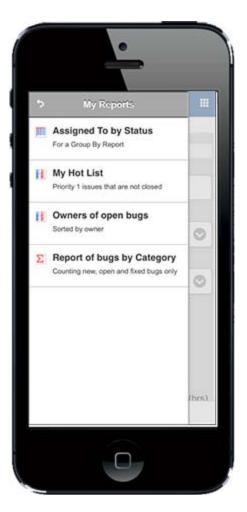


Note that the fields presented to you on this screen vary, according to how your administrator sets up your system.

It is likely that the remaining buttons on your navigation menu will have been customized. In this example, the **Add** entry allows you to add one of several types of issues:



The **Report** menu allows you to run any report that has been set up for you to access. You can set up personal reports you want to access on your mobile client from the desktop interface. Your site administrator will probably also have given you permission to run various public reports. A typical reports menu looks like this:



Reports may be enclosed within folders, and they support runtime filters, just like the desktop client.

Adding & Updating Issues

Adding and updating issues is virtually the same as when you are working with your desktop browser. Your administrator will have configured layouts for your screens that are equivalent to the desktop layouts, but will be more suitable for viewing on the small formats of phones and tablets. Following are two screenshots with samples of *Add Issue* screens.

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There are a few points to notice on the above screens. First, to submit your issue, use the button in the top right-hand corner of the screen. There night also be a second button close by the Submit button. Your administrator may have configured this to contain additional options for the screen. Your administrator may also have configured two buttons at the bottom of the screen, allowing you to move forwards and backwards through the workflow. This is often much more convenient and usable than scrolling a long way down a very small screen.

Documents, Images and Signatures

If your site is configured to use document or image fields, then these may be uploaded from your mobile client to the ExtraView database.

Note: There is a significant limitation of Apple iOS devices, in that they prohibit the uploading of documents stored on your mobile device. You have access to the photo library and to the camera to upload images, but there is a restriction within the device to inhibit access to documents. This limitation is not present on Android devices.

You may upload signatures or other information drawn on the screen of your mobile device when you choose the **Canvas** option after the **Upload** option presented with image type fields.

Workspace Interface

Workspaces provide a single browser window within which you can run all of ExtraView's functions. Within the browser window, a separate panel is opened for each function. For example, you might open an *add* screen, an *edit* screen, and several reports, all at the same time. Each panel has a title bar that contains buttons to control the functions within the window, as well as buttons to minimize, maximize, and close the panel.

This is in contrast to the ExtraView standard interface which provides access to ExtraView functions one at a time.

The standard interface is typically used for straightforward processes where users carry out a single task at a time. The workspace interface is a tool that lends itself to multi-tasking where users might need to quickly move between different tasks, or where users require the power of a windowed interface wth drag-and-drop capability.

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A typical workspace

If the administrator has given you permission to use workspaces, you may have any number of workspaces, and each may contain different panels. You may save the state of the workspaces, and these will be restored when you reopen them.

Setting Your Start Point in ExtraView

There are several start pages that are provided as alternatives to the Home Page. This icludes workspaces - this is an alternative user interface to the standard user interface. With permission, you may start your ExtraView session in the standard interface, or within the workspace interface. You may also switch between the interfaces.

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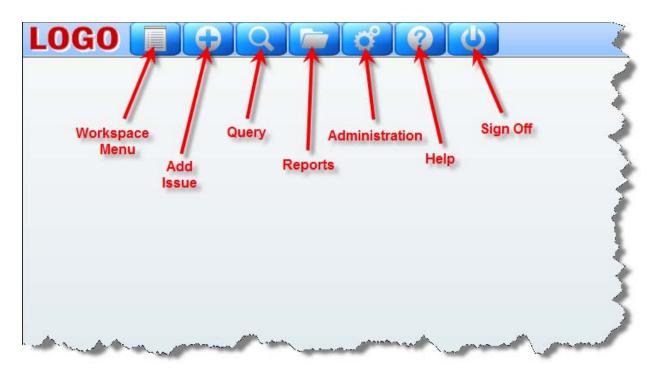
Setting where you start in ExtraView

Use your personal account options to set the screen where you would like to start your ExtraView session. If you choose the workspace interface as your start point, you can also select the title of the workspace with which you which to start. You can have as many workspaces as you would like for different purposes. Each saved workspace is set to your choice of role, Business Area and Project, as well as any combination of panels opened when you open the workspace.

If your administrator has granted you access to workspaces, there is also a section where you can set different settings for your workspaces, such as options on what happens when you drill down from a workspace, and which workspace you want to load when you first sign on to a workspace.

Navigation Bar

A typical workspace navigation menu looks like the following screenshot. Observe the icons on the navigation bar and the workspace canvas beneath. As you open new workspace panels, an icon for each is added to the navigation menu and a panel with the function is opened on the canvas. You may click on any of the icons to bring the panel represented to the top of your workspace. The workspace may occupy a space wider and higher than both your browser window and your computer screen. Scrolling across the virtual space is permitted. You may drag a panel off the visible portion of the workspace and leave it there. Clicking the panel's icon in the navigation bar results in the panel becoming visible, wherever it is on the canvas, and coming to the front of all other panels.



Workspace navigation

Note that your administrator may have configured different navigation buttons to appear on your site. This includes the presentation of navigation bars that might include "drop-down" list selections.

The Workspace Menu

When you access the Workspace Menu by moving your mouse over the first button on the navigation bar, you are shown a panel that allows the following to take place. Not all the options will be available, if your adminstrator has not granted you access.

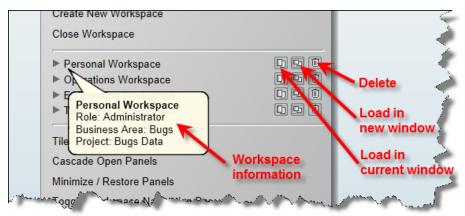
Engineering Workspace		
Engineering Workspace		
Search for ID #		
Role Administrator		
Business Area Bugs		
Save Workspace		
Save As a New Workspace		
Create New Workspace		
Close Workspace		
▶ Helpdesk		
Personal Workspace		
Operations Workspace		
Engineering Workspace Test Case Management		
 Test Case Management Customer Workspace 		
Tile Open Panels		
Cascade Open Panels		
Minimize / Restore Panels		
Toggle Workspace Navigation Bar		
Edit Your Account Details (Bill Smith)		
About ExtraView		

Workspace Menu

- **Drilldown Box**: This is a Search box that allows you to enter either keywords or issue ID's to retrieve matches. The following rules apply:
 - You may enter a single issue ID, or multiple issue ID's. Separate multiple issue ID's with a semi-colon character. If there are no results, ExtraView will attempt to treat the issue ID's as words and look for these as text
 - You may enter any single word or multiple words. ExtraView treats these as Quickfind queries and fetches the results
 - If you start your entry with a # character, then the search can be complex. Please see the <u>Quickfind documentation</u> for full instructions
- A select list that allows you to change your current role
- A select list that allows you to change your current business area and current project
- A link which allows you to save the current workspace. Open panels and their positions are saved. You must provide a title to your saved workspace. If you check the prompt by **Set as your current workspace** then the workspace becomes the one first opened when you enter ExtraView
- A link which allows you to **Save Workspace** under a different name. Open panels and their positions within the current workspace are saved. You must provide a title to your saved workspace. In addition, you may select a different role and/or a different Business Area and Project for the new

workspace. If you check the prompt by **Set as your current workspace** then the workspace becomes the one first opened when you enter ExtraView. You may save the workspace for your own personal use, or save it to be shared as a public workspace. Shared public workspaces are displayed grouped together beneath your personal workspaces. Note that you should not save Quicklist and Detailed reports as part of your workspaces. Their contents are only generated when you drilldown from a query or report. They will result in an empty panel when you load a saved workspace with either a Quicklist or Detailed report

- A link to close your workspace. If you have more than one workspace open, then the browser window containing the workspace is closed for all the secondary workspaces opened after the first one (known as the primary workspace). If you close the primary workspace, you are returned to the standard interface
- A list of all workspaces that you have saved. Each workspace entry has an informative link and three buttons:



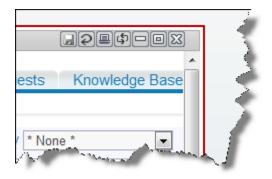
Workspace navigation

Note that if you have set a workspace as the default, its title will appear in bold, and there will not be a delete button. If you want to delete a workspace that has been set as the default, save another workspace as the default once, then delete the original one.

- If you place your mouse over the arrow at the left of its title, you will see information such as the role, Business Area and Project to which the workspace belongs
- If you click on the title, or the first button, the workspace is loaded into the current window, replacing the current workspace
- \circ The second button loads the workspace into a new browser window or tab
- $\circ~$ The third button allows you to delete the workspace
- A link to **Tile Open Panels**. The open panels will be sized so that they are all visible, and occupy the complete area of the browser window
- A link to **Cascade Open Panels**. The panels are arranged from the top left-hand corner down towards the bottom right-hand corner
- The **Minimize** / **Restore Panels** button will toggle all panels off, and then on again when the link is chosen a second time. When the panels are minimized, you can open any panel from its button on the navigation bar
- A link to Edit Your Account Details. When you choose this, you can modify your details, after entering your password
- A link **About ExtraView**. This link will show you copyright information, as well as specific information about the version of ExtraView that you are using

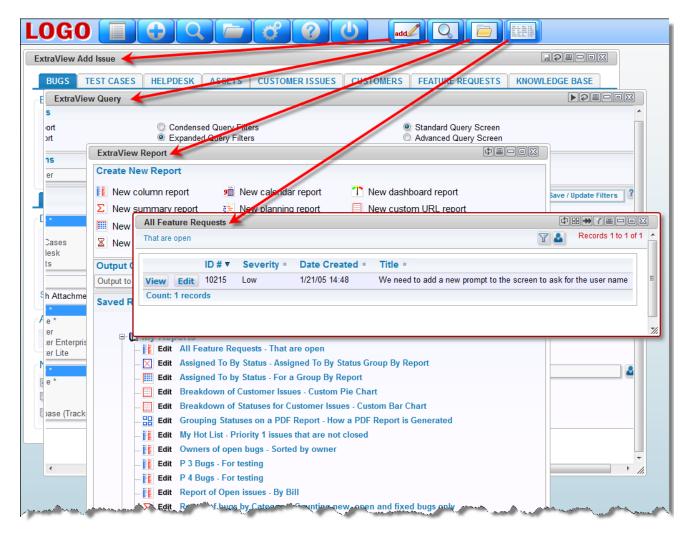
Managing Panels

Each panel that opens will have small icons at the top-right hand corner that perform functions specific to that panel when they are pressed. All panels have icons to minimize, maximize and close the panel. The remaining icons are used to perform tasks such as update, delete, run, etc. All icons have a help tip which is seen by holding your mouse over the button.



Managing workspace panels

Each open panel has a corresponding icon placed in the navigation bar, to the right of the main navigation bar icons. At any time, you may click on one of the icons and the panel to which it corresponds will jump to the front of all other panels. If the panel is out of range of the browser window, the workspace is scrolled so that the panel becomes fully visible. Note that if you place your mouse cursor over an icon, you will see the title of the panel to which it corresponds.



Navigating through open panels

If you double-click on the title bar of a panel, then the panel is maximized, if you double-click again on the title bar, the panel is restored to its original size.

Drag-and-Drop

Workspaces are enabled with drag-and-drop, between panels. This is unlike the standard interface, where drag-and-drop only works within a window. There are specific actions which are allowed with drag-and-drop, and drag-and-drop is not valid between all panels, but only between those which will produce a valid result of a logical action.

Firstly, drag-and-drop actions are only valid between specific types of report outputs or edit panels within workspaces. The basic premise is that you can drag one or more issues from a report output panel and drop the issues within another report output panel. When ExtraView sees that the values within the issues being dragged can be changed to match the filters within the panel where the issues are being dropped, the issues being dropped will be updated accordingly.

For example, consider you have two column reports:

• Report A has filters of *Product* = *myProduct* and *Status* = *Open*

• Report B has filters of *Product* = *myProduct* and *Status* = *Fixed*

Using the standard convention with a click of your mouse to select and drag an issue from Report A, and drop the issue on Report B, the *Status* of the issue will be updated to *Fixed*. Reports may have a button in the title bar of the panel that enables the record selector to allow multiple records to be selected for an operation. This button is used for all of these purposes:

- You can drag all the selected issues and drop them on another panel to perform a mass update operation, where all the issues being dropped will take on the values of the filters in the second panel
- You can click the Detailed Report button to obtain a report of all the selected issues
- You can click the Group Issues button to place the selected issues within a relationship group
- You can perform a Mass Update of the issues
- You can export the selected issues

When you drag a number of selected issues you will see an indication of the number of issues being dragged, and when you drop the issues on a different panel, the mass update utility is invoked to perform updates on all the issues being dropped, to match the values of the filters in the panel where the issues have been dropped. In the same way that you may decide to inhibit the sending of email notification upon a mass update operation, you are given the same choice when dropping a number of issue, to either send or not send email notification.

You may only initiate one drag-and-drop operation at one time, and although you can perform other actions such as run reports and update issues, you must let the updates from the drag-and-drop action complete before beginning another drag-and-drop.

This table shows the valid drag-and-drop operations between report types. If the report type is not in the table, then drag-and-drop actions are not supported at this time to reports within their panels.

	Column Report	Summary Report	Matrix Reports	Quicklist Report
Column Report	\checkmark	\checkmark ¹	\checkmark ²	\checkmark
Summary Report	\checkmark	\checkmark ¹	\checkmark ²	\checkmark
Matrix Report	\checkmark	\checkmark ¹	\checkmark ²	\checkmark
Quicklist Report	\checkmark	\checkmark ¹	\checkmark ²	\checkmark

- 1. When you drop one or more issues on a summary report, you must drop the issues on a row within the report. This report helps define the target filters for the drop, with the issue assuming the values of each of the fields in the columns that define the summary report
- 2. When you drop one or more issues on a matrix report, you must drop the issues within a cell on the report. The field values of the row and the column within the report act as filters for the drop, and are used in addition to overall filter values for the matrix report

Drag-and-Drop and Workflow

Drag-and-drop provides a quick, convenient method to update issues for many purposes. When you dragand-drop a single issue, you will see a popup window if there are dependencies. For example, if a field becomes required as part of an update, and it does not have any contents when you drop the issue on a report to execute the update, the popup will present the field and will require you to provide a value for the missing field.

However, there are some occasions when dropping an issue will produce an error, and no update is performed:

- When the update encounters a business rule that executes a STOP or an ERROR. On these occasions, you will see the reason for the failed update. Simply *edit* the issue and update through the screen
- When the update encounters a reauthorization or electronic signature request. This update must also be accomplished via an *edit* screen.

Drag-and-Drop and Query Filters

Only AND conjunctions between filters are allowed on the drop area report. all other filters fail when you attempt to drop one or more issues. This is because filters such as OR lead to ambiguous results, in that trying to change a field value to either one value or another makes no sense.

Only EQUAL (=) and IN operators for filter values are supported. Filter operators such as NOT EQUALS (<>) and GREATER THAN (>) are not supported. Again, the use of these operators would lead to ambiguous results in the updates to be applied to the issue or issues being dropped. Multiple values within the IN filter is not supported.

Drag-and-Drop to Relate Issues

There are several convenient places from where you can drag an issue, and drop it onto a related issue display. This implies that the issue being dropped is to be added to the relationship group that forms the related issue display.

• Detailed Reports - There is a button at the top left-hand corner of the screen. The icon depicts a hand which can be dragged and then dropped onto a related issue display to relate the issue within the related issue display to its relationship

EntraView Det		7	
		Y 🗳	Displa
	Issue #	Created	Last
Edit	320692	December 10, 2015	Dece
Test Plan Name	Title		
10.0 Build 102	10.0 Build 102		
Product	Test Version	Originator	Test
ExtraView	10.0	Jennie Briend	Carl
Plan Completed	Test Plan Complete Approver	Test Plan Completed Date	

• Edit Screens - The button at the top left-hand corner of the screen depicts a hand which can be dragged and then dropped onto a related issue display to relate the issue within the related issue display to its relationship

ExtraView Update Issue - 10723	ı f
ID # 10723	Date Created Jan 3, 2013
Bug Details	
Category Documentati 🗸	Priority P 4
Title Add Business Calendar	- Test Case Failure
Product Tracker Lite 🗸	Module Installation
	5
Originator Bill Smith	Assigned To Bill Smith

Drag-and-Drop and Multi-Valued List Fields

When you drop one or more issues onto a drop area which contains fields with filters on one or more multi-select fields, the behavior is as follows:

- If a report is created where the filter criteria includes the multi-valued field, with the opeartor "=" and a single value is selected, the filter shall be used to *add* the selected value to the multi-valued field. For example, if the issue has a multi-valued list field named **FRUIT**, with the values **apple**, **orange** and **pear**, and **apple** is selected, when you drop the issue onto the report where the filter criteria is **FRUIT** = **orange**, the result will be that the updated issue will have both **apple** and **orange** within the field
- If a multi-valued field is one of the axes of a matrix report, and you drag an issue into a cell specifying one particular value of the field, the issue is updated to *add* the value to the multi-valued field. Existing values in the field are left untouched. Using the same field explained in the previous bullet as an example, when you drop an issue with the value of **apple** onto a cell where the value is **orange**, the updated issue will have both **apple** and **orange** within the field
- If a report is created where the filter criteria includes the multi-valued field, with the operator IN and multiple values are selected, the filter is discarded for the update to the issue. For example, if the filter criteria is **FRUIT IN apple, orange** the **FRUIT** field is not used for the update
- If a report is created where the filter criteria includes multiple instances of the multi-valued field, and where the operator is "=" and the filter criteria use **AND** as the conjunction, the filter is used in the update, and all values will be added to the field within the issue. For example, if the issue has **apple** selected, and you drop it onto the report where the filter criteria is **FRUIT = orange AND FRUIT = pear**, then the issue is updated to have **apple**, **orange** and **pear** all selected in the field.

In summary, updates via drag-and-drop to multi-valued fields never remove values from the list, and handle all filter criteria in a manner consistent with normal single-valued list fields.

Drag-and-Drop and Repeating Rows

Repeating row fields may be part of the filters in the drop area for a drag-and-drop operation. The following rules are observed:

- 1. There must be only one repeating row displayed on the destination issue, and a single value within the field. If this were not the case, ExtraView could not tell which value was to be given to the issue being dropped. An error is given, and the drop operation fails if this rule is contravened
- 2. If a field's filter value in the drop area is different from the value in the issue, the issue in the drop

area is used to update the value of the field being dropped

- 3. If a repeating row does not exist in the issue being dropped, but exists in the issue within the drop area, a new repeating row is created within the issue being dropped
- 4. If a repeating row exists in the issue being dropped, but the field used as a filter does not have any value, the filter field is given the same value as that in the issue in the drop area.

Managing Issues

The *Add* screen allows you to create data related to a specific issue and enter the issue into ExtraView's database. This is normally the main point of entry for the issue tracking process. The screen presented to you has been designed by your system administrator, and may look significantly different from the example shown.

	>				
Home · Add · Query · Report · Workspace · Administration · Help · Sign Off * Select a report *	~				
ubmit Print Page ExtraView Add Issue ?					
Bug Details	Т				
Category * None * V Status New Priority * None * V Severity * None * V					
Title					
Product * None * V Module * None * V Platform * None * V Customer Name					
Release Found Originator Bill Smith Assigned To * None * V Owner * None * V					
DETAILS COMMENTS TEST CASE RELATED ISSUES RELEASE FIX INFO SOURCE CONTROL RELEASE NOTES					
Description	1				
Description + Screenshot					
Attachments					
Add Thumbnail File Description File Name File Size					
Notifications					
Generate Email 🗹 CC Email					
Include self on interest list					
Include Customer users in notification D Mailing List Mailing List					
ubmit Print Page					

Typical Add Issue screen

To navigate to the screen above, click on the Add button on the ExtraView navigation bar. Note that you will not see the menu bar when you are adding and editing issues, as using these options could cause you to lose any changes you are currently making to the issue.

Business Areas

Business Areas may be represented by the tabs at the top of the window or by selecting the Business Areas from the **Add** navigation button, depending on how the administrator set up your system.

The following example screens are configured with the following business areas:

- Bug / Defect tracking
- Helpdesk, including the ability to track the assets assigned to people who use the helpdesk
- Test Case Management
- Customer Support, including the ability to manage Customers
- Feature Requests
- Knowledgebase which can publish issues created in any of the above areas, or issues to publish can be entered directly

Navigation Bar Selection

LOGC		Account: Bill Smith Administrator Search for ID # Bugs
Home	Add Query Report Workspace	Administration Help Sign Off *Select a report*
Submit Print	Add a Helpdesk Ticket	ExtraView Add Issue
Bug Deta	Add a Bug	
Cate	Add a Test Plan	Priority * None * Severity * None *
	Add a Test Case	
Pro	Add an Asset	Platform * None * V Customer Name
Release Fo	Add a Customer Issue	Assigned To * None * V Owner * None * V
	Add a New Customer	
DETAILS	Add a Feature Request	JES RELEASE FIX INFO SOURCE CONTROL RELEASE NOTES
Descriptic	Add a Knowledge Base Item	

Tab Selection

LOGO	Account: Bill Smith Administrator V Search for ID # Bugs V
Home + Add + Query + Report + Workspace + Administration + Help + Sign Off	* Select a report *
Submit Clear Print Page	ExtraView Add Issue 💿
BUGS TEST CASE MANAGEMENT HELPDESK ASSETS CUSTOMER ISSUES CUSTOMERS	FEATURE REQUESTS KNOWLEDGE BASE
Bug Details	
Category None Status New Priority None	Severity ane *

Managing issues and items in all these areas is similar. The next section gives examples of the different types of fields you will see through the different business areas.

Filling out fields

- Not all fields may need to be filled in only the fields where the labels are in bold are required. In some installations, your administrator will have decided on a different method to highlight required fields, such as using a different color. The above screen uses red color to signify a field is required
- Embedded layouts may have been designed into your site. If your installation uses embedded layouts, this will be evident in that some portion of the screen may change when you select a value in a key field. For example, if you have a field named Category, and you have several possible categories such as Hardware, Software and Documentation, the following fields on the screen may be dependent on the selection. If you have required fields on different layouts, and you try to submit an issue where required information is missing from one or more of these embedded layouts,

ExtraView will inform you with a combination of the layout name plus the specific field name of the required value that must be filled in

- When you select a field, the screen form (or parts of the screen form) may refresh. When this happens, ExtraView is retrieving dependent information, to populate other fields on the screen. For example, when you select a *product*, a field name *module* may be refreshed, giving you the valid (and only the valid) list of modules for the product chosen. Another example may be that when you choose a module, ExtraView may retrieve the owner of the module within the system, so the issue can be assigned to them. You cannot make further entries to the ExtraView screen form while the screen is being refreshed
- Other validations may take place for fields that you enter. For example, numeric and date fields will be checked, and validation that is more sophisticated may take place, according to how your administrator set up your site
- Assuming your administrator has enabled ExtraView's built-in spell checker, misspelled words will be underlined in red and the user will be able to correct the spelling by right-clicking on the word and choosing the correction from the list offered. With permission the user may also add new words to the dictionary.

Field Types

Tab Fields



Example of a tab field

Tab fields typically segment the screen into separate areas, above and below. In general, the contents of the screen beneath a tab field will alter when you click on an entry in the field. For example, when you visit either the *Add* or the *Edit* screen, there may be sets of tabs. The screenshot in the example allows you to choose different business areas within ExtraView. When you click on any of these tabs, the area of the screen beneath the tabs refreshes with the appropriate fields and values for the data for the tab. One usability feature is that if you have a form within a browser window that is longer than the height of the window, and you choose a different value for the tab, ExtraView will place the new embedded layout to display at the top of the screen, thereby preventing the situation where the new layout may be hidden beneath the bottom of the window.

List fields

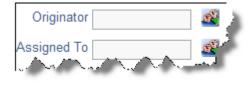
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Product	* Any *	
Modulo	* Any * * None *	
Woulde	* None *	
	Tracker	
	Tracker Enterprise	
Saved Re	Tracker Lite	\sim
have a start and		

A list field allows you to select a single member of the list, by clicking on the entry you want to select. List fields can be standalone, or they can form part of a relationship, where the members of the list either alter the contents of another list (i.e. the field is a parent of another field), or the members of the list are changed by selecting a value in another list (i.e. this field is a child of another field).

Some list fields may not have the value * **None** * in the list. In this case, you are being forced to select a value from the list, whether or not the field is required. The field defaults to the first value in the list which will be selected if you do not choose another value. Some list fields on add and edit screens may have the value * **New** * in the list. This allows you to add a new value into the field, without being an administrator. When you select * **New** * a window pops up, to obtain the values needed for the new entry.

Some list fields may be configured as multi-valued list fields. In this case, the user may select and number of values within the list, by clicking on each one that is being selected. The user simply clicks on a selected value and this will deselect it.

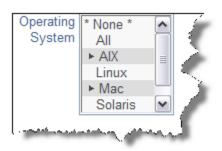
Popup list fields



Popup fields are a variant of the List display type field. Popup lists are typically used for large lists where the number of entries makes a standard list difficult to search through, or visually awkward within a browser window.

With a Popup field, you may either type in the entry for the list, or click on the icon beside the text entry box. When you click on the icon, a search window appears, allowing you to perform a wildcard search, or to drill down to the item you want to select. Click on the item to select, and its value will be placed in the field. Popup fields may have been configured by your administrator with an auto-complete function. Auto-complete, or type-ahead as it is sometimes known, works by having one or more characters typed into the list and then automatically presenting you with the most likely matches for the value you are composing. At any time you can select a value from those presented to you by clicking on the value, or you may continue typing in characters until you complete the value. As you type, the values presented in the list are refined to further match your entry. Popup list fields may be configured as multi-valued popup list fields. In this case, the user may select any number of values within the list. You may select more values within the list than you can see within the field. If you want to know all the values currently selected, simply place the mouse cursor over the button to the side of the field. This will display a list of all the currently selected field values.

Multi-value list fields



The multi-value field type allows you to select more than one item from a list. For example, the screen below shows two languages can be selected from a list, as indicated by the plus signs. Each item in the list is selected or deselected with a single click of the mouse. If you click on the * **None** * item, then the list is cleared. Note that the arrow character may be another character such as "+". You may use a single click on a value, and then a shift key plus mouse click on another value in the list in order to be able to select a range of values in a list.

Your administrator may have enabled an option that groups together all the selected items in a multi-valued list. If this is enabled, then the selected values are shown at the top of the list, followed by the nonselected values. The list is automatically resorted when you first display the add or the edit screen, and when the screen refreshes for any reason.

Radio Button fields



Radio buttons have at least two options to choose from. You make the choice by clicking on the appropriate option. Note that the administrator of the site may have set the radio buttons to flow horizontally or vertically on the screen. Your administrator can also alter the presentation of radio buttons, from circular buttons, to square buttons.

Image fields



you want to store. Images are reduced in size for display on the screen, but you may click on the image at any time to display it in its full size. If your administrator has given you permission, you may also delete the image, using the **–** button. If you want to download an image field, right-click with your mouse, and use the Save-As option in your browser.

Document fields



Document fields allow the storage of a document file inline, within an issue. When you click on the 🛨 button by the field label, a popup allows you to select the document from your computer that you want to store. Documents are shown with an icon representing its type, for example a spreadsheet or an Adobe Acrobat document. You will also see the file name of the document. To view the document, simply click on the icon or on its filename. If your administrator has given you permission, you may also delete the document, using the **–** button. If you want to download a document field, right-click with your mouse, and use the Save-As option in your browser.

Date and Day fields



Day

Popup

Date Calendar

Calendar *Popup with* time

All date fields will have an adjacent "calendar" 🛄 icon. Clicking this will activate a popup a window as shown below, so that you can navigate to the correct year and month, and then click on the day you want to select. The difference between Date and Day fields is that Date fields store the time as well as the date, and all Dates are corrected for a user's personal time zone setting. Day fields are absolute, and are not corrected for the user's time zone. Also, they do not have a time component.

Number, currency and decimal fields

These all store numbers of various forms, but with slight variations. Numbers are generally used for numbers where high precision is not needed. Currency fields may display the currency symbol, and thousands separators in any of the world's currencies, as set up by your administrator. Decimal fields are set up to store numbers where there may be a large number of decimal places, and where it is important to not lose precision. All number fields can be totaled on column reports.

User name fields

User name fields can exist in several basic forms:

- As a drop-down select list, where you click on the name in the list to select it
- In a pop-up select list, where ExtraView presents a list of users in a pop-up box, allowing you to drill down into the list to find the user you are looking for
- Select lists may also be configured with an auto-complete option. The drop-down select lists are typically used when the list of names you are searching is of a modest number, pop-up lists can be used to search through thousands of users in an efficient manner. Auto-complete, or type-ahead as it is sometimes known, works by having one or more characters typed into the list and then automatically presenting you with the most likely matches for the value you are composing. At any time you can select a value from those presented to you by clicking on the value, or you may continue typing in characters until you complete the value. As you type, the values presented in the list are refined to further match your entry.

Note: If your installation is configured to use an LDAP connection with the behavior setting named LDAP_USER_LOOKUP having a value of YES, when auto-complete is configured, only users that are currently stored within ExtraView are returned with auto-complete, as opposed to all potential users in the LDAP server. This prevents a potential performance issue, returning a huge number of records from the LDAP server to ExtraView, whenever a user presses a single key

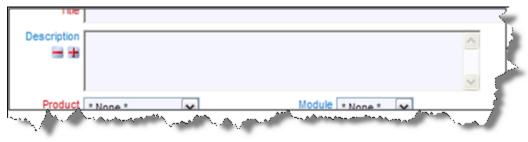
• If the user field has a "user list" icon, clicking this will activate the popup window. This presents a search screen where you can find the name of the user. Searching may be accomplished by knowing all or part of the Last Name, First Name or User ID. Enter as much of the name as you know, and press the **Search for Account** button. The window will refresh, showing the names of all the users who match the information you offered. You can use a "*" as a wildcard within your search pattern. When you see the details of the user you are searching for in the pop-up select list, click on the User ID and the name will be populated back into the screen from which you commenced the search.

igned To * Any *	#1 Extention	Hieroroft	Internet Eve	larar				-	_	X
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Allen Johnson				e as you know. For example					POWERED BY	
Andrea Palmer	match 'Smith', 'Sn	nile', etc. You d	an use an "" as	a wildcard pattern in your	search. Search	ing is not case sensit	ive.		Extra	ie
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	TRINA.LOREN		640-230-7039	Tirzah_H_Lusen@gsk.com		315-480-5636				
	WLEE	Willian Lee		william.lee@ama.com						
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Pop-up select list

Text fields

A blank field value on input is considered as the same as 'null' or no input, and will be so treated. For example, a single blank value is not permitted in a required field. Trailing and leading blanks are significant when adding or updating and issue, and are stored in the database as they are entered. However, you cannot search for these rows using equality on the text field. Keyword search strings are always trimmed of leading and trailing spaces. Hence, entering "abc" into a field will effectively render that field non-searchable using that text field as a filter. Tab characters are filtered from text fields. Each tab character is replaced with a space character. Text fields and log fields (text fields that retains previous text, and add a date and time stamp to previous entries) have two small icons — and → beneath their label. These allow you to shrink and grow the length of the text box, giving you a smaller or larger area in which to enter text.



Text Field

If your administrator has configured the option, when you have reached the bottom row of the text field,

the field will automatically expand, offering you more space in which to enter and edit text. The text will continue to expand until the preset maximum height is reached. A special property of text field is that if you enter a URL into the field, then when the field is rendered on a report, or the field is rendered in a read-only mode, then the URL becomes a hyperlink to the URL. For example, if you enter **http://www.mycompany.com** or **www.mycompany.com** on a report, and if you click the text, a new window will open at the address of the URL. This behavior is extended one step further. Assuming that the title for the ID field in your instance is **ID** #, then entering **ID** # **12345** into a text field, will provide a link on reports and read-only versions of the field, to the detailed report view of the issue with the ID of 12345. If the title to the ID field is **Report Number**, then you would enter **Report Number 12345** for the same effect.

Comments fields

Comments (aka log area) fields are similar to text fields, with a single, important difference. You may only add new comments to a field; you cannot change an existing comment. In this way, you can instantly see on the screen a log of text being accumulated as an issue is processed. Along with each entry you will see a timestamp and the user's name that made the comment. When you are adding a new issue, there are no preexisting comments therefore the field looks identical to a text field. If your administrator has configured the option, when you have reached the bottom row of the comment field, the field will automatically expand, offering you more space in which to enter and edit text. The text will continue to expand until the preset maximum height is reached.

When an issue has existing comments, small arrows appear by the user name and timestamp of the first comment. Use these arrows to sort and resort the comments.

A special property of text field is that if you enter a URL into the field, then when the field is rendered on a report, or the field is rendered in a read-only mode, then the URL becomes a hyperlink to the URL. For example, if you enter **http://www.mycompany.com** into a text field, then it will appear as **http://www.mycompany.com** on a report, and if you click the text, a new window will open at the address of the URL. This behavior is extended one step further. Assuming that the title for the ID field in your instance is **ID** #, then entering **ID** # **12345** into a text field, will provide a link on reports and readonly versions of the field, to the detailed report view of the issue with the ID of 12345. If the title to the ID field is **Report Number**, then you would enter **Report Number 12345** for the same effect.

HTML AREA fields

Your administrator may have configured a field on a screen to accept rich text / HTML as it will be rendered on reports. This field can be used to store text, images and to embed entire documents or images. The field type looks like this on the screen:

This is a field with nem text.	
Company Name	
User Name	
Address	
Country	

HTML Area field

As you enter text / images into an HTML Area field, it will grow in height to allow you to see as much of the information as possible, to a maximum height which is set to be a little less than most screens.

Images may be pasted from your computer's clipboard into the HTML Area field. If you paste an image, it is seen in its actual size. If you paste a file, so that it is being embedded within the field, then an icon represents the file.

The toolbar may have been configured by your administrator to offer a different range of buttons. This may include a much more limited set of buttons as well as some buttons that are not depicted in the screenshot.

The HTML Area utility makes use of scripts that run within the browser, and according to the security settings of your browser, you may need to acknowledge that it is OK to run these scripts. For full information on how to use the HTML Area field type, please see Appendix B to this guide.

Checkbox fields

Checkbox fields are set with a single click of the mouse. When set, a tick mark shows in the box, when not set, the box is empty.



Example checkbox fields

Email notification

You will receive an email after you add the issue, unless you have disabled this option in your personal option screen.

Attachments		Add	File Description			File Size	
Notification	•	Generate Em	ail	CC Email			and the second s
		Include self	on interest list	Add users to interest list			<u>a</u>
	Г	Include Cust	omer users in notification	Mailing List	Bill Smith ; Chris Robinson ; M	lary Brown ;	
				5	usan Green		
					Submit Clear Print	Page	

Email Notification section of the Add and Edit screens

Others, whose names appear in the user name fields, such as owner and assigned to, will receive email notification. You may join the interest list for the issue by clicking on the checkbox with the label **Include self on interest list**. With permission granted by the administrator, you may also add others to an interest list for this issue. You can also enter other email addresses in the **CC Email** field for copies of the notification to be sent to those people. These people need not be ExtraView users as long as your organization has the appropriate license for its ExtraView software.

Linked fields

0

If any of the fields on the screen have a link icon, the button will link to another site, application or window within ExtraView, based on the value you enter in the field or the item you select from the list and as set up by your administrator

Repeating record fields

Add another Release record

Some fields or groups of fields are termed as repeating fields.

If a field is repeating, there will be a button, beneath the group of fields with a label such as **Add another Release record** or **Add another Version record**. Pressing this button allows you to add an additional value or values for the field. When you click this button, a new entry row for the repeating field(s) opens on the screen. This is typically used to break an issue into sub-issues, or to add a number of dependent data items to an issue.

Note: You may see a completely different set of fields in your installation, depending on how your system was implemented.

Workflow Process and the Status Field

This field is important in most installations of ExtraView, and special rules may apply to how it functions. For example, your administrator may have determined that issues may only be moved in a particular pattern, or workflow. The administrator may also have decided that these workflow status rules are different for different user roles within your organization. For example, these are valid rules:

• Engineers may open and fix issues, but they may not close them.

- QA personnel may open and close issues, but they may not fix them.
- Administrators may do anything

The status field may appear with different entries at different points within the process. For example, on the Add Issue screen, there may only be a status of new, whereas on the Edit Issue screen, there may be some combination of open, fixed and closed, depending on your role. ExtraView makes certain that users follow the process required. The status field may appear as a normal list field, or may appear as shown in the following screen shot, where a more graphical representation is used to show the status list to which you are allowed to move the issue.

	STATUS TRANSITION - Click on new status to transition the issue	
Status		^
	Open Fixed/Pending Duplicate Not Found	
		×.

Alternative Status display

Allowed Values

When you select a value from a list, the form may bring back data that is dependent on the selected value. For example, if you select a field named *Product*, then a list in a *Module* field may be refreshed, showing only the valid entries for the *Product* selected. These are termed Allowed Value Lists and are maintained by the administrator.

Allowed value lists are an efficient mechanism to make certain that you can only add valid data to a form. In the case just defined, the *Product* field is termed the **parent** and the *Module* field is termed the **child**. The parent and child fields may not be select lists. They may also be selection tabs across the screen, or they may be pop-up lists. Pop-up lists are most frequently used when there are a large number of options to choose from, and some searching for the value may need to take place.

Allowed value lists may be chained together. You might see a chain which is termed *grandparent --> parent --> child*. An example might be *Product Family --> Product --> Component*. When you choose a value for *Product Family*, the *Product* list will only show the members of the *Product Family*. Similarly, when the user chooses a *Product*, the *Component* list will show only the *Components* for the selected *Product*.

Reverse Allowed Values

These are only implemented infrequently by your administrator. In this case, when you encounter an allowed value list combination, all lists are initially popuplated with all values. You choose a value from any of the lists and the other lists are filtered to only show valid entries, whether they are parents or children.

Adding an Issue

LOGO	Account: Bill Smith Administrator
	earch for ID # Bugs
Home · Add · Query · Report · Workspace · Administration · Help · Sign Off	* Select a report *
Submit Print Page	ExtraView Add Issue ?
Bug Details	
Category * None * V Status New Priority * None * V Severi	ty * None *
Title	
Product * None * V Module * None * V Platform * None * V Customer Nam	
Release Found Originator Bill Smith Assigned To * None * V	er * None *
DETAILS COMMENTS TEST CASE RELATED ISSUES RELEASE FIX INFO SOURCE CO	NTROL RELEASE NOTES
Description	NIROL RELEASE NOTES
Description	Upload
-+ ^	Screenshot
· · · · · · · · · · · · · · · · · · ·	$\langle \mathcal{D} \rangle$
Attachments	
Add Thumbnail File Description File Name	File Size
Notifications	
Generate Email 🗹 CC Email	۵.
Include self on interest list Add users to interest list	<u>۵</u>
Include Customer users in notification Mailing List Bill Smith;	
Submit Print Page	

Add Issue screen

For the ExtraView *Add* Issue screen pictured above, enter information in the various fields as appropriate, and the click the **Submit** button. The tab field in the center of the screen allows you to enter information into sub-layouts on the screen; each contains information appropriate to the tab you select.

Note: Deselect the **Generate Email** box to disable automatic email generation. Select the name of a desired one-time automatic email recipient in the CC Email field. Click the Mailing List link icon to see the list of all current email recipients. This list will include users who are on an Interest List.

Note: Field names given in bold or highlighted in some other way, are required fields. Also, note that where field dependencies exist, a selection must first be made in the parent field's pick list in order for the child field's metadata to appear.

If you click the **Submit** button and errors exist with your data, you will see appropriate alerts, and you can resubmit your issue after correcting the problems.

In most installations, you will see a confirmation screen once you have successfully submitted your issue. This will show you the entry you have made, and again, in most cases, you will be able to edit the issue if you spot any errors or see changes you'd like to make. Note that the confirmation screen does not display the mailing list. If you want to go back and see who was notified of the submission, you can look at the history of the issue.

Editing an Issue

Editing an issue that has been entered into the database allows you to update the status of an issue, change incorrect information or add additional information. Note that the *Edit* screen may look different from the *Add* screen. The administrator is able to design different layouts for each purpose of adding or editing an issue. The *Edit* screen can be accessed from any of the following screen locations:

- Quicklist Report
- Detailed Report
- Summary Report
- Custom Report
- Home Page Reports
- New Issue Summary Screen
- ExtraView Email Notification
- Drill-down box on the navigation bar

Update & Continue Delet	te Clone Email Histo	cory Close Print Page	•		E	ExtraView Update Issue ?
ID # 10736	Date Created Jan 2	20, 2013	Last	Changed By Bill Smith	Last	Modified Jul 13, 2014
Bug Details						
Category Software	Prior	rity P 3	 Severity Me 	dium 🗸	Customer Name Chr	ysler 🔍
Title JavaScript error when	n you load the edit page	e				
Product Tracker	Modu	ule GUI	Platform Ma	cintosh 🗸	Release Found	
Originator Bill Smith	Assigned	To Bill Smith	Owner * N	one * 🗸 🕨	Privacy Priv	vate 🗸
Resolution * None *	Needs Doc Chan	ige 🗌	Ranking			
STATUS TRANSITI	ON - Click on new sta	itus to transition the i	ssue			
Status						
	N	New — Open — F	ixed — Closed —	Duplicate Not Found		
DETAILS COMMENTS	TEST CASE RELA		ELEASE FIX INFO	SOURCE CONTROL	RELEASE NOTES	HISTORY WORKFLOW
Release Fix Repeating Ro	w Details					
Delete Requested Release Co	ommitted Release Re	elease Assigned To	Release Status	Notes		
□ * None * ▼ *	None *	None *	* None *			
Add another record						
Attachments						
Add Hist Thumbnail	File Descri	iption	File Name	File Size	Created By	Date Created
Notifications						
	Generate Email		CC Email			2
Incl	lude self on interest list	Add u	isers to interest list			4
Include Custom	ner users in notification		Mailing List 🛛 Ma	ry Brown ; Chris Robinson ;	Bill Smith ;	
			_			
Update & Continue Delet	te Clone Email Histo	close Print Page	9			

Edit Issue screen

To edit an issue:

- Click on the **Edit** button next to the issue you want to modify. You will see a screen similar to the one above, with data specific to the particular issue
- Make any changes or add any information
- Click the **Update** button. The issue has now been updated, and email notification is sent out to the appropriate parties
- If your administrator has configured the option, and you are editing an issue by drilling down from a report, then there will be two buttons on the menubar, **Update & Next** and **Update & Prev**. These allow you to move through a list of issues from a report, and to update one, then move to the next or previous issue without going back to the report

• There may also be an **Update & Continue** button. When you click this button, there will be a short delay and you will see the message **Saved** appear on the screen. You may then continue editing the issue.

Sending Email

If your administrator has given you permission, you will be able to send email from the Edit screen, using the Email button on the button bar. This email is different from the standard notification, as you can either choose from a set of prepared templates, or you can compose the email directly on the screen. When you press the Email button on the toolbar of the Edit screen, a screen similar to the following will be shown.

end Email Cancel Print F	age	Custom Email
Directions		
	or compose a new email by entering text directly. User's email addresses that are within the issue can be selected from the ddresses as needed. If your administrator has configured the option, the email you send will be added back into the issue as	
You may upload attachments t	o send out with your email. Attachments will also be added into the issue associated with the email.	
ID #	10736 - JavaScript error when you load the edit page	
Select email template ?	* Blank *	
From User ?	*Select * 🗸	
Enter addresses, one per line		
dditional email addresses ?	* None *	
	* Select All *	
	Chris Robinson	
CC Email addresses ?		
Subject line ? Send standard notification ?		
Include CC recipients ?		
Email body ?	🕞 Source 👼 🦻 🔏 🛱 🛱 🛱 🖘 🖈 Styles - Format - Font - Size - 🛕 🛣	5
	B I U S X₂ X² I∡ I I II II II II II B E E E E ■ ∞ ∞ № H H II	©Ω©
		4
Attachments		-

Preparing to send email from the edit screen

	Page Custom Email ?
Directions	
	, or compose a new email by entering text directly. User's email addresses that are within the issue can be selected from the mailing list. You can addresses as needed. If your administrator has configured the option, the email you send will be added back into the issue as an attachment.
You may upload attachments t	to send out with your email. Attachments will also be added into the issue associated with the email.
ID #	10736 - JavaScript error when you load the edit page
Select email template ?	New feature request thank you
From User ?	* Select *
Enter addresses, one per line	
dditional email addresses ?	* None * * * * * * * * * * * * * * * * * * *
CC Email addresses ?	
	Thank you for your submission
Subject line ? Send standard notification ?	Thank you for your submission
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □ □ □ □ □ □ □ □ □ □
Subject line ? Send standard notification ? Include CC recipients ?	Thank you for your submission □ □ □ □ □ □ □ □ □ □
Subject line ? Send standard notification ? Include CC recipients ? Email body ?	Thank you for your submission □ □ □ □ □ □ □ □ □ □

Loading a template to send email

Options

- If you choose a template from the **Select email template** list, the **subject line** and **email body** will be provided for you to use "as is" or to modify with any changes you make
- If offered the ability to choose the user sending the email, do so from the list From User
- If you want to send an email that you compose directly, enter the recipient's email address into the area **Enter addresses**, one per line and choose additional users from the list in the **Additional** email addresses
- You may select additional users to copy on the email from the CC email addresses entry
- Enter a subject line for the email
- Checking the box **Send standard notification** causes the underlying issue to be updated and the standard email notification to be sent at the same time you send the email you are composing
- If you check the **Include CC recipients**, the list of users to whom the email is sent is appended to the outgoing email. Note that these are not placed within the CC line of the outgoing email, as ExtraView respects the roles and security permissions for the outgoing email. The outgoing email sent to all the users may be different according to the recipient's role
- Enter the text for the email in to the **Email Body**.
- When complete, press the **Send Email** button. The email you have just sent is added back into the issue as an attachment, as a record of the communication.

More About Templates

Your administrator may have pre-defined a range of templates. These are prepared emails that you can choose within the list entitled **Select email template** list. If you choose a template, its text will be placed within the **email body**.

Templates often have tokens defined, such as \$\$ID\$\$ or \$\$DESCRIPTION\$\$. These will be substituted when the email is sent, using the value of the fields within the issue. For example, \$\$ID\$\$ may be replaced with 12345 if 12345 is the issue number. When you select a template, there is a warning if you already have text in the email body, ensuring you only overwrite the body deliberately.

Viewing Issue History

ExtraView retains a record of changes that you make to any issue. You can thus track the history of changes from the time the issue is first entered until it is finally closed. This provides a complete audit trail of all the changes, as a issue is tracked from its creation to its final closure.

- Click on the Edit button next to the issue you want to view.
- Click the **History** button at the top of the Edit screen.
- There are four possible styles of History report. Your administrator will have selected which ones are most appropriate for your organization
 - The first style is a simple look at the key status changes, who made them and when they occurred. This is displayed as part of the *edit* screen
 - The second type shows all fields on the record, for each entry. Your administrator will have configured a layout which determines which fields are displayed, and in what order they appear
 - The third style only shows the fields that have altered between successive edits. This is more concise and is most useful if you have a very large number of fields on the screen. This is known as the abbreviated history display
 - The last type is similar to the third style, but within each history entry, the old value is shown alongside the current value. This is known as side-by-side history.

Depending on which of the history methods your administrator allows you to view, there will be a button on the menubar which allows you to view each of the methods with a single mouse-click.

Note: You will see the most recent records first. The changes between successive records are marked in different colors on the screen, allowing you to easily identify the field changes that were made in each edit session. Naturally, all the fields are in a single color on the last record on the report, since every field was new when the issue was entered.

The administrator will have chosen different colors to signify field additions, field value changes and field deletions. The simple history summary is a single read-only field that is displayed on the *edit* screen. This shows the changes in status only, who made the status change, and when the change occurred.

History	New		Fixed		Open	
	Jan 8, 2013	\rightarrow	Nov 10, 2013	\rightarrow	May 22, 2014	
	Bill Smith		Bill Smith		Bill Smith	

Simple Summary of History

Cancel Full Hist	ory Abbreviated Display	Abbreviated Side-by-S	6ide Display	Page
Displaying records	1 to 20 of 25 🕨			
ID #	Title			
10731	Error when creating a rec	ord		
Date Created	Days Created Since	Last Modified	Days in Status	Days Open
Jan 8, 2013	843	Apr 30, 2015	344	843
Originator	Last Changed By	Assigned To	Product	Module
Bill Smith	Bill Smith	Bill Smith	Tracker	Database
Category	Status	Priority	Severity	Platform
Software	Open	P 3	High	Solaris
Release Found	Needs Doc Change	Resolution	Privacy	Customer Name
	No	Implemented	Private	Bear Inc.
Description				
Add a record and o	observe log file			
Reproducible	Occurrence	Operating System	Test Case	
No				
ID # 10731	Title Error when creating a rec	ord		
Date Created	Days Created Since	Last Modified	Days in Status	Days Open
Jan 8, 2013	843	May 22, 2014	344	843
Originator	Last Changed By	Assigned To	Product	Module
Bill Smith	Bill Smith	Bill Smith	Tracker	Database
Category	Status	Priority	Severity	Platform
Software	Open	P 3	Low	Solaris
Release Found	Needs Doc Change	Resolution	Privacy	Customer Name
	No	Implemented	Private	Bear Inc.
Description				
Add a record and o	observe log file			
Reproducible	Occurrence	Operating System	Test Case	
No				
ID #	Title			
10731	Error when creating a rec	ord		
Date Created	Days Created Since	Last Modified	Days in Status	Days Open
Jan 8, 2013	843	May 22, 2014	537	843
Originator	Last Changed By	Assigned To	Product	Module
Rill Smithas	Bill Smith	Bill Ath A	· · · · · · · · · · · · · · · · · · ·	

History, displaying complete details

Cancel Full History Abbreviated Display Abbreviated Si	de-by-Side Display Print Page	History of changes for Alt ID # 📀
Displaying records 1 to 20 of 25		
Alt ID #	XXX-10731	
Last Changed By	Bill Smith	
Last Modified (TIMESTAMP)	Apr 30, 2015	
Severity	High	
Notification History	Timestamp: Apr 30, 2015 Subject: [Extra View 10731]: Error when creating a record Role used: Customer Support From User: admin@my_company.com Sent to: <u>Chris Robinson</u> Timestamp: Apr 30, 2015 Subject: [Extra View 10731]: Error when creating a record Role used: Administrator From User: admin@my_company.com Sent to: <u>Mary Brown</u> , <u>Bill Smith</u>	
Alt ID # Last Changed By Last Modified (TIMESTAMP) Notification History	XXX-10731 Bill Smith May 22, 2014	
Alt ID #		
Last Changed By	Bill Smith	
Last Modified (TIMESTAMP)	May 22, 2014	
Priority (PRIORITY)	P 3	
Priority (PRIORITY_BLOCK) Notification History	Timestamp: May 22, 2014 Subject: [Extra View 10731]: Error when creating a record Role used: Administrator From User: admin@my_company.com Sent to: <u>Bill Smith</u>	
Constant Section States and the constant of the section of the sec	Timestamp: May 22, 2014 Subject: [Extra View 10731]: Error when creating a record Role used: Quality Assurance From User: admin@my_company.com Sent to: <u>Man Brown</u>	

History displaying changes only

Cancel Full History Abbreviated Display Abbrevia	ated Side-by-Side Display Print Page	History of changes for Alt ID #
Displaying records 1 to 20 of 25 🕨		
Title	Previous Value	New Value
Alt ID #		XXX-10731
Last Changed By		Bill Smith
Last Modified (TIMESTAMP)	May 22, 2014	Apr 30, 2015
Severity	Low	High
Notification History	Timestamp: Apr 30, 2015 Subject: [Extra View 10731]. Error when creating a record Role used: Customer Support From User: admin@my_company.com Sent to: <u>Chris Robinson</u> Timestamp: Apr 30, 2015 Subject: [Extra View 10731]: Error when creating a record Role used: Administrator From User: admin@my_company.com Sent to: <u>Mary Brown</u> , <u>Bill Smith</u>	••• g •
714		
Title Alt ID #	Previous Value XXX10731	New Value XXX-10731
Last Changed By	XXX10/31	
		Bill Smith
Last Modified (TIMESTAMP)		May 22, 2014
Notification History		
Title	Previous Value	New Value
Alt ID #		
Last Changed By		Bill Smith
Last Modified (TIMESTAMP)	May 5, 2014	May 22, 2014
Priority (PRIORITY)	P 4	P 3
Priority (PRIORITY_BLOCK)		
Notification History	Timestamp: May 22, 2014 Subject: [Extra View 10731]: Error when creating a record Role used: Administrator From User: admin@my_company.com Sent to: <u>Bill Smith</u>	
and the second second second second second	Timestamp: May 22, 2014 Subject: [Estra View 10731]: Error then creating a record	and the second

Side-by-side History view

Display of Checkbox Values in History

Checkbox fields present a unique challenge within the history of an issue. Despite most people believing checkboxes have 2 values, **Yes** and **No**, there is actually the possibility of interpreting a third value, **Undefined**. This exists if the checkbox has never been set by the user. ExtraView's reporting always display a **Yes** or **No** value for every checkbox, and the user cannot distinguish between **No** and **Undefined** on an *add* or *edit* screen. However, it can be important to distinguish between the **No** and **Undefined** values in the history of an issue. ExtraView uses the following conventions in History for the display of checkbox values:

Full History	For consistency with reports, both No and Undefined checkbox values are represented with a No on the output. When an issue is first created, the No value is colored red. From that point, the No value is displayed in black, and a green Yes will appear when the user checks the box.
Abbreviated History	No entry is displayed for a checkbox when the issue is first created, unless the user checks the checkbox, in which case a red Yes will appear on the output. From the point forward where a checkbox value is changed, the new value always appears in green.
Abbreviated Side- by-Side History	No entry is displayed for a checkbox when the issue is first created, unless the user checks the checkbox, in which case a red Yes will appear on the output. From the point forward where a checkbox value is changed, the new value always appears in green.

Relationship Groups

• Add new comment

Each issue in ExtraView may be associated with a Relationship Group. A Relationship Group is a grouping of issues within the system for the purpose of keeping track of similar or related items. There are a number of types of relationship groups that can be utilized within ExtraView. Each type has different characteristics and different methods of operation. Relationship groups may also differ considerably in the user interface that manages them.

There are several ways in which relationship groups, or related issues, can be displayed and managed. Two of these are shown below.

Creating Related Issues from an Add or Edit Screen

Consider the following Add screen:

mit Clear Print Page			Extraview Add Iss
ncident CAPA Adverse Event	MedDRA		
tient Details			
First Name	Last Name	Date of Birth	Age at Time
Gender 💿 Female 🔘 Male	Height (cm)	Weight (Kg)	Date of Death
Telephone	Email Address	Address	Country USA
		= *	,
			T
porter Details			
Reporter / Patient Same Person?			
First Name	Last Name	Clinic Location * None *	Reported Unknown
Telephone	Email Address	Address	Country USA
Reporter HCP?		= +	~
ident Details			
Title			Assigned To * None *
	-		Assigned to None
cident Summary - Click to Expand			
harma Product Details - Click to Exp	re l		
Add a New Adverse Event			Adverse Events
ere are no related items			
achments			
Add Thumbnail	File Description	File Name	File Size
tification Generate Email	CC Email		

Add screen with a Related Issue Section

When you press the button to add a new related issue (in this case an Adverse Event), you will see a popup window as follows:

Submit Clear Close Pr	nt Page		Extraview	Add Issue
Incident CAPA Adver	se Event MedDRA			
Adverse Event Details				
Patient First Name	Last Name	Gender Female	Age at Time of Event	
		Required Doctor No	Date of Death	
Product * None	► Dosage * None * ►	Frequency * None *	Route Used Cutaneous	
Required Hospitalization 📀 No	C Yes	Title		
Seriousness * None	*	AE Description		* E .
Other reason				
Event Abated * None when Stopped	r 💽			*
Event Reappeared * None	-	Relevant Tests		
after Reintroduction		= +		
Event Outcome				-
Attachments				
Add Thumbnail	File Description	File Name	File Size	
Submit Clear Close Pr	nt Page			
				·E
				-
ms		III		•
Thumbnail	File Description	File M	Jamo E	ile Size

Popup to Add the Related Issues

Once you have added data to the *Add* screen and added a couple of related issues, the screen will look like this:

	ear Pi	rint Page							Extraviev	v Add Iss
ncident	CAPA	Adverse Event	MedDRA							
Chacht	0/11/1		noubrot							
tient De	tails									
Fir	st Name	Alison	Last Name	Alexander		Date of Birth 🛛	/3/1959		Age at Time 52 of Event	
	Gender	Female C Male	Height (cm)	167]	Weight (Kg) 4	1		Date of Death	
Te	elephone	454 112 1515	Email Address	aalexander@xxx	k.com	Address 2	1 Bruce St.	*	Country USA	
						= + /	Anytown	-		
									_	
porter D										
Reporter Same	/ Patient Person?									
	st Name	Alison	Last Name	Alexander		Clinic Location	on * None * 👻		Reported Unknow	1 💌
Te	elephone	454 112 1515	Email Address	aalexander@xx	x com	Addres	s 21 Bruce St.		to FDA Country USA	
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ident De	etails -									
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cident S	ummary	- Click to Expand								
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Add screen with related records added

Create or Update a Relationship Group from a Quicklist Report

You may also create new relationship groups, or add issues to existing groups, from the Quicklist report. This has the advantage of allowing you to group issues that have common attributes because of a previous filtered sort. Note that this feature is not turned on in the standard issue tracking installation, as its use will conflict with the previous method of relating issues to each other. Your system administrator will have configured this if appropriate.

After a search on a particular keyword, you might find that there are multiple variants of the same issue in the system, that these are assigned to different people, and that they are at varying stages of completion. Using relationship groups, you could decide to keep them all *Open* but still group them with the prospect of a common, future resolution. This can be done by producing a Quicklist report, then grouping the issues together.

To Create Groups from Quicklists

		ist Report					Record	ds 1 to 8 o
	en AND Busine Bill Smith on 2	ess Area = Bugs AND A /13/06	ssigned To = Bill Sm	th				
	▼ID #	Business Area	Title				Days C	Ореп
	Priority	Customer	Status	Product	^m Modu		# Assign	ned To
/iew Edit	10517 P 2	Bugs	Any new item add Open	ed to the database can be sear Tracker	ched before it is in the	approved state	11 Bill Smith	
/iew Edit	10515 P 3	Bugs	Here is a training e Open	example at Toyo in Tokyo Tracker			18 Bill Smith	
iew Edit	10489 P 3	Bugs	Customer receive: Open	s error CX3456 when they first : Tracker Enterprise	sign on		75 Bill Smith	
liew Edit	10460 P 3	Bugs	Reporting problem Open	with the interface module in the Tracker Lite	database integration n	nodule	75 Bill Smith	
liew Edit	10254 P 1	Bugs	Problem with the C Open	GUI widget Tracker			353 Bill Smith	
liew Edit		Bugs	A program except lengthy report	ion occurs when the user selec			381	
iew Edit	P 2 110231	Bugs	Open The link from the n	Tracker eport page "Support" button is b	Databası roken	8	Bill Smith 381	
	P3		Open	Tracker	GUI		Bill Smith	
liew Edit	10216 P 3	Bugs	I found a bug in the Open	e database table definition name Tracker	d XYZ Database	е	385 Bill Smith	
							Record	ds1 to8 c

Quicklist Report screen

A screen similar to the following appears:

11 135005 11	nto a ne	w or ex	isting relationship group	Update	Cancel	Print Pa
Create no	ew Relation	onship Grou	p C Merge with existing Relationship Group			
Fixed databas	se name Title Type	One-to-M	any 💌			
Click her Page size	re to check	k or unche	want to include in the relationship group. You can view any issue to check the det k all the issues in the list odes in the tree	ails by clicking the Is	sue #.	
B- Issue 1 to	7	Open) tes				
			horization to provide new furniture for new employee - Gloria Menendez			
			horization to provide a new telephone extension for new employee - Gloria Menendez			
				97		
				ez		
- 1	10516 (0	Open) Aut	norization to provide a new computer for new employee - Gloria Menendez	ez		
V	10516 (0 10300 (0	Open) Aut Open) Cus	norization to provide a new computer for new employee - Gloria Menendez tomer needs help	22		
<u>ସ</u>	10516 (0 10300 (0 10272 (0	Open) Aut Open) Cus Open) This	norization to provide a new computer for new employee - Gloria Menendez	22		

Create a New Relationship Group screen

- Enter a new title for the relationship group, and select the type of relationship group from the dropdown menu. The different types of groups are as follows:
 - **Bi-Level** This requires that one issue from the group is the parent, or master issue. Rules may apply to the group. For example, you may not be able to *close* the master issue unless all the other issues are already *closed*. This type of relationship group is being deprecated, and you should use one of the other relationship groups. These types are supersets of the bi-level type, therefore you will only gain in functionality
 - **One-to-Many** This group requires that one issue from the group is the parent, or master issue.
 - **One-to-Many Cascade** This type is similar to the One-to-Many relationship group type. The difference is that when a user deletes an issue which is the parent of one or more child issues, then the child issues are also deleted, as opposed to leaving orphaned child issues in the database, once the parent is deleted.
 - **Many-to-Many** This group is a free-structured group where issues may have parents or children in an arbitrary way. This extends so that a child may in itself be the parent or a child of any other issue
- Click the **Update** button to form the group and continue.

To Update Groups with Additional Issues

From the previous screen, click on the Merge with existing Relationship Group button.

nsert issues into a new or existing relationship group	Update Cancel	Print Page
C Create new Relationship Group		
Existing Groups * Select *		
Uncheck any issue that you do not want to include in the relationship group. You can view any issue to check the details by clicking	the Issue #.	
Page size 20		
Click here to expand all the nodes in the tree		
E Issue 1 to 7 ↓ [♥] 10535 (Open) test		
- ID518 (Open) Authorization to provide new furniture for new employee - Gloria Menendez		
- 🔽 10517 (Open) Authorization to provide a new telephone extension for new employee - Gloria Menendez		
10516 (Open) Authorization to provide a new computer for new employee - Gloria Menendez		
- 🔽 10300 (Open) Customer needs help		
10272 (Open) This will be mapped to EV		
□ I0269 (Open) New entry point to be created		
	Update Cancel	Print Page

Adding issues to an existing relationship group

From the list of relationship groups select the existing group to which you want to add the issues. Again, you may alter the list of issues as you update the group.

Update Relationship Group Issues

Once a relationship group has been created, and issues have been associated with it, ExtraView will notify

the user of the existence of related issues each time you do a issue update, and give you the opportunity to make batch-level status changes, as needed.

Perform Group Updates

- Edit a given issue as desired, and click the Update button.
- If the issue belongs to a relationship group, the following screen appears:

Update Related Issues				[Update Issues	Cancel	Print Page
The item you are updating has relate optionally select any fields below th						to all the iter	ms, and
1 - Update Options							
Update this item only (Press the C) Update all related items	e 'Update Issue	es' button after se	electing this option)				
2 - Check the box to add the fo	llowing Com	ments to all rel	ated items when you up	odate			4
							~
3 - View the related items and	check the ad	ditional fields y Status	ou want to update in th Assigned To	ese items Title			
View Edit	and the second second	Fixed Open	Greg Goldberg Greg Goldberg	When the user presses the Here is a sample bug being b		its 2 second	IS I
4 - Check the fields in the lis	t below that y	ou want to upo	late to the same values	in the issue being updated. T	'he new value is s	shown.	
Resolution Implemented	n						
5 - Notification options Notify users on the current iss	ue only						
Notify users on all the issues in		ip group					
			Update Issues Cance	Print Page			

Update Related Issues screen

- View related issues as desired, by clicking on the View button.
- Check appropriate boxes to update the status and/or resolution for every issue in the group.
- Enter comments to be automatically added to every issue in the relationship group.
- Click the Update Issues button.

Manage Relationship Groups

In addition to the ability to create relationship groups, add issues, and perform batch updates, ExtraView also provides relationship group management features, including merging relationship groups, and splitting relationship groups. Again, your administrator must have configured this option and given you permission to access this feature, before the button appears on the Edit screen.

1. From a given issue's Edit screen, click the Manage Relationship Groups button.

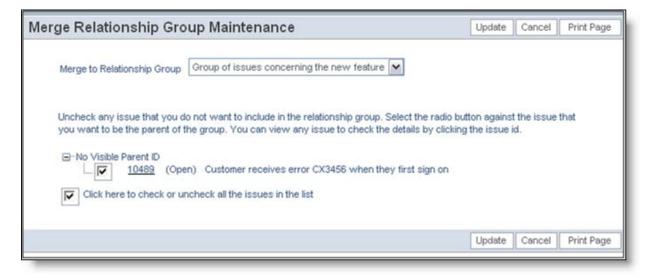
The following screen appears:

	Return	Print Page
Select or Alter Filter for the Relationship Group		
ID # 10489 Relationship Group Group of issues concerning the new feature tatus * Any * Originator * Any *		
Select Action to Perform on Relationship Group		
Merge Displays a list of Issue ID # objects that are generated from the selected filter criteria above. Merging moves the Issue objects from their current relationship group into the relationship group that is selected on the next screen. The filter criteria are pre-populated with the current Issue ID # and the current relationship group title. After these as appropriate. Note that if the ID # in the filter is not erased, then the only Issue returned in the list on the next screen will be the current Issue.		
Split Displays a list of Issue ID # objects that are generated from the selected filter criteria above. Splitting moves the selected ID # objects into a new relationship group. The list generated on the next screen will further allow you to select/deselect individual Issue objects and to enter a Title and Parent for the new group. For example: if this ID # is part of a relationship group, this group will be pre-selected in filter criteria. If you want to select all of the ID # objects from the current relationship group do not select any further filter criteria. Erase the ID # and any other filter criteria that are selected except for the relationship group.		
	Return	Print Page

Relationship Groups screen

Merge Issues into New Relationship Groups

- To merge a issue from one group into a different group, select filters to return appropriate issues, and click the **Merge** button.
- A screen similar to the following appears:



Merge Relationship Groups screen

To merge the issues in the sort result into a new relationship group, select the desired group from the pick list, and then click the **Update** button.

Splitting Relationship Groups

- To split an existing group by moving an issue over into a new group, select the desired filters, and then click the **Split** button.
- A screen similar to the following appears:

riveral	ionship Gro	oup Mainte	enance				Update	Cancel	Print Pag
Title Owner	Bill Smith	~]					
	any issue that you the group. You ca					button against the issu	e that you war	nt to be the	
	isible Parent ID								
	and an	-		ig example at To e list	vo in Tokyo				

Split Relationship Group screen

- Enter a title for the new Relationship Group, then select a Group owner from the pick list.
- Remove any issues that you don't want to split off by un-checking the associated checkboxes.
- Select a parent issue for the new group.
- Click the Update button.

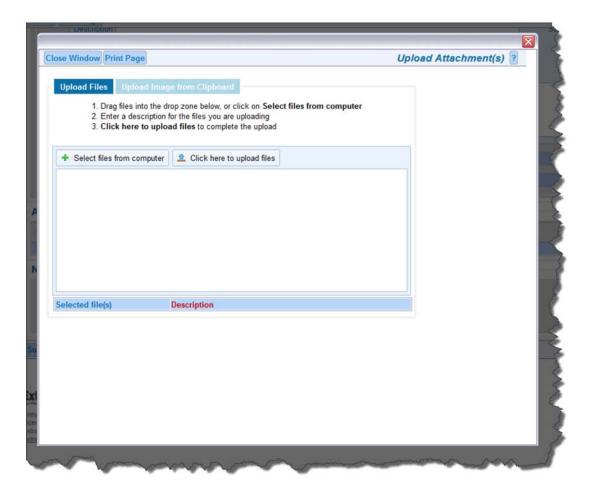
Attachments

ExtraView gives you the ability to add an unlimited number of file attachments to any ExtraView issue. Attachments can include captured screen shots and documents or files. ExtraView gives you the ability to attach any number of files of any type to any given issue. Depending on the database used on the ExtraView server, each file attachment may be up to 2 GB (Microsoft SQL Server) or 4 GB (Oracle). If the database is MySQL, then the size limit is set by the administrator, but is generally smaller.

There are several interfaces for uoading file attachments within ExtraView. The primary method is described first. The remaining methods were used with earlier versions of ExtraView but retained for backwards compatibility. The reason for the change was browser developers such as Google and Mcrosoft removing support for Java applets being run within browsers. The primary interface works across all support browsers, but does lack some minor features.

Adding Attachments

From the *add* or the *edit* screen, click the **Add Attachments** button. A popup window will be displayed. The upload screen looks like this:

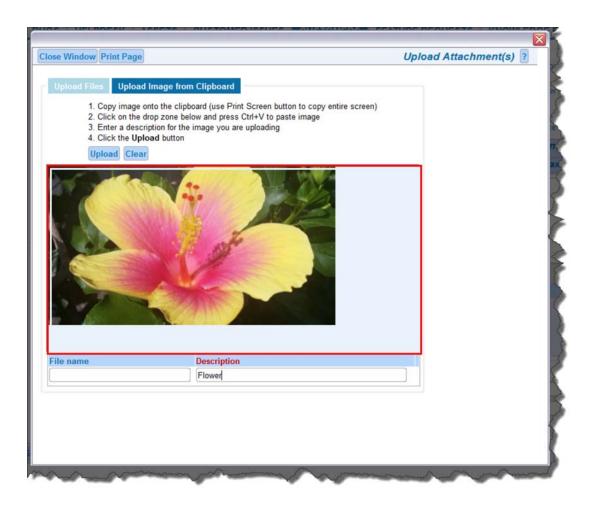


You may select up to 10 files to be uploaded in one operation. These files may be selected by using the **Select files from computer** button and selecting them from the file system, or by dragging the files from your desktop or file manager and dropping them into the panel. Once you have the selected the files, you enter descriptions for each of them in the popup, then press the **Upload** button.

You will see a progress bar for each file as it is being uploaded, similar to the screenshot below.

3. Click h Character		iles to complete th	e upload	LITE 8 Unicod	e 8-bit Transfer	
	-	es from computer	Ø Cancel upload	Un donicou	e o-bit Transier	
			20150518_102442.jpg (765.	99 Kb)	×	
	EXE	Ar	cGISExplorerDownload.exe (2	239.79 Mb)	×	
	^e W	b	ound0m_shp_nt00298.tar.gz	(7.19 Mb)	×	
elected file	(5)	Description				
0150518_102	2442.jpg	20150518_10244	2.jpg			
rcGISExplore	erDownload.exe	ArcGISExplorerD	ownload.exe			
		bound0m_shp_nt	00298.tar.gz			

You may also load images as file attachments, direct from the clipboard of your computer. Copy a screen, or a portion of your screen onto the clipboard and within the **Add Attachment** popup, click the button at the top with the title **Upload Image from Clipboard**. Right-click with your mouse on the drop area and select **Paste**, or click **CTRL-V** and your image will be placed in the popup where it can be uploaded as a file. You will give the image a description, and optionally a file name:



Viewing Attachments

From the *Edit Issue* screen, click the **View** button next to the Attachment you would like to view. If the attachment is an image file, of type JPG, GIF or PNG, then a thumbnail image of the attachment will appear, and you can also click on the thumbnail to view the complete attachment.

ments							
Hist	Selec	t All					
	Select?	Thumbnail	File Description	File Name	File Size	Created By	Date Created
Edit			Issue 2 DEV - 3854 - Alert Report Container from Link.pdf	Issue 2 DEV - 3854 - Alert Report Container from Link.pdf	48141	Carl Koppel	May 18, 2017 11:19:26 AM
Edit		PDF	Issue 1 PROD - 10151 Batch Trend Run from Link.pdf	Issue 1 PROD - 10151 Batch Trend Run from Link.pdf	502994	Carl Koppel	May 18, 2017 11:19:26 AM
Edit		NOF.	Issue 1 DEV - 5930 ETO - browser Run from Link.pdf	Issue 1 DEV - 5930 ETO - browser Run from Link.pdf	34258	Carl Koppel	May 18, 2017 11:19:26 AM
Edit			filter_definitions_selected.png	filter_definitions_selected.png	193186	Carl Koppel	May 18, 2017 11:19:26 AM
Edit			select_report_properties.png	select_report_properties.png	168578	Carl Koppel	May 18, 2017 11:19:26 AM
Edit			output definition.png	output definition.png	214334	Carl Koppel	May 18, 2017 11:19:26 AM
Edit			repeated group headers.png	repeated group headers.png	60153	Carl Koppel	May 18, 2017 11:19:26 AM
	Hist Edit Edit Edit Edit	Hist Select Select? Edit Edit Edit Edit Edit	Hist Select All Select? Thumbnail Edit Select? Select?	Hist Select All Select? Thumbnail File Description Edit Issue 2 DEV - 3854 - Alert Report Container from Link.pdf Edit Issue 1 PROD - 10151 Batch Trend Run from Link.pdf Edit Issue 1 PROD - 10151 Batch Trend Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf<	Hist Select All Select? Thumbnail File Description File Name Edit Edit Issue 2 DEV - 3854 - Alert Report Container Issue 2 DEV - 3854 - Alert Report Container Fidit Issue 1 PROD - 10151 Batch Trend Run from Link.pdf Issue 1 PROD - 10151 Batch Trend Run from Link.pdf Issue 1 PROD - 10151 Batch Trend Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Link.pdf Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from	Hist Select All File Description File Name File Size Edit Issue 2 DEV - 3854 - Alert Report Container Issue 2 DEV - 3854 - Alert Report Container 48141 Edit Issue 1 PROD - 10151 Batch Trend Run from Issue 1 DROD - 10151 Batch Trend Run from Issue 1 DROD - 10151 Batch Trend Run from 502994 Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from 34258 Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from 193186 Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from 193186 Edit Image: Select_report_properties.png filter_definitions_selected.png 193186 Edit Image:	Hist Select All Select? Thumbnail File Description File Name File Size Created By Edit Issue 2 DEV - 3854 - Alert Report Container Issue 2 DEV - 3854 - Alert Report Container 48141 Carl Edit Issue 1 PROD - 10151 Batch Trend Run from Issue 1 PROD - 10151 Batch Trend Run from Issue 1 DEV - 5930 ETO - browser Run from 502994 Carl Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from 34258 Carl Edit Issue 1 DEV - 5930 ETO - browser Run from Issue 1 DEV - 5930 ETO - browser Run from 193186 Carl Koppel Iihter_definitions_selected png filter_definitions_selected png 193186 Carl Edit Image: Imag

Edit Issue screen

Editing and Deleting Attachments

Note that your administrator must have given you permission to delete attachments.

- From the Edit Issue screen, click the Desc button next to the attachment that you want to edit.
- Change the description and then click the **Update** button.
- If you would like to delete the attachment, click the **Delete** button.

Viewing the history of attachment changes for an issue

From the Edit Issue screen, press the **Hist** button to see a record of all the changes to attachments within an issue. This only appears if your administrator has given you permission. The history attachment screen is as follows. Note that you will see the history of all attachments for the issue, showing whether each attachment was inserted, updated, viewed or deleted.

File Name	Change Type	File Size	File Description	Created By	Date Created	Last Updated by User	Last Date Updated	
E_FTS_Common-20060116.doc	Insert	2949120	Specification for the repair of this issue	Bill Smith	2006-02-12 17:11:52.0	Bill Smith	2006-02-12 17:11:52.0	6
E_FTS_Common-20060116.doc	Update	2949120	Specification for the repair of this issue	Bill Smith	2006-02-12 17:11:54.0	Bill Smith	2006-02-12 17:11:52.0	6
report interface 5.0.ppt	Insert	101888	Interface report for the repair	Bill Smith	2006-02-12 17:12:43.0	Bill Smith	2006-02-12 17:12:43.0	6
report interface 5.0.ppt	Update	101888	Interface report for the repair	Bill Smith	2006-02-12 17:12:43.0	Bill Smith	2006-02-12 17:12:43.0	e l
report interface 5.0.ppt	Update	101888	Interface report for the repair / update	Bill Smith	2006-02-12 17:12:43.0	Bill Smith	2006-02-12 22:44:41.0	18
bear.jpg	Insert	180532	Picture of problem	Bill Smith	2006-02-12 22:45:03.0	Bill Smith	2006-02-12 22:45:03.0	6
bear.jpg	Update	180532	Picture of problem	Bill Smith	2006-02-12 22:45:03.0	Bill Smith	2006-02-12 22:45:03.0	
bear.jpg	Delete	180532	Picture of problem	Bill Smith	2006-02-12 22:45:03.0	Bill Smith	2006-02-12 22:45:03.0	ř.

Attachment history screen

Cloning an Issue

For some kinds of issues, such as repetitive customer issues, it may be useful to clone an existing issue, and then make some small set of modifications to the new record.

• From a given issue's edit screen, click the **Clone** button.

Include self on interest list Include Customer users in notification	Mailing List 2 Mary Brown ; Susan Green	2
a second and the second s	Update Delete Clone Email History Close Print Page	2

Issue Edit screen

If there are required fields that must yet be entered on the edit screen, you are prompted to complete these, and the Clone operation is not completed.

Before ExtraView clones the issue, you are asked to confirm that it is OK to save the changes you may have made, and proceed with the cloning operation.

If the form is complete, the following alert message appears to indicate success:



Clone Issue Alert Message

- Click the **OK** button, and the cloned issue's edit screen becomes available.
- The cloned issue is distinguishable from the original by the issue number, and by the following message that also appears on the edit screen:

Release Found		
Comments		<u>_</u>
	December 27, 2004 Bill Smith	
	Mon Dec 27 16:37:10 PST 2004	
	This Issue # 10203 has been cloned. The new ID # is 10205	
	Mon Dec 27 16:13:25 PST 2004	
	Here is a comment added to this issue when we increased the priority to P 2 Wed Jun 30 13:46:36 PDT 2004	
	Bad designs lead to poor implementations	
	SUB-ISSUE INFORMATION	
	Delete Requested Release Committed Release Release Assigned To Release Status Notes	
	I.1 V George Miler V Opera V	and the second

Cloned Issue Edit screen

Note: The user who clones a given issue becomes the originator of the newly cloned issue (whereas the originator of the first issue may very well be someone else). In addition, the date/time that the cloned issue was created becomes the current date/time for the new issue.

Deleting an Issue

- 1. Click on the **Edit** button next to the issue you want to modify (from a Quicklist Report, Detailed Report, email notification, etc.).
- 2. Click the **Delete** button at the top or bottom of the Edit screen.

Note: The Administrator may have turned off the option to delete issues in your installation.

Mass Updating of Issues

Assuming the administrator has given you permission, there will be a button labeled **Update Issues** on Quicklist Reports, Detailed Reports and Custom Reports that you generate. This button allows the batch or mass update of a list of fields available to you. For example, you may want to re-assign all the open issues assigned from one person to a different person. Another example may be to move a range of issues open against a specific release to another future release of the product. Not all fields can be updated by this method. Only fields to which you have write access, and fields that are of display type List, Pop-up, Tab, User, Checkbox, Text and Number can be updated. In addition, if a field is subject to special treatment or processing that has been set up by your administrator, it will not be available for updating by this method. If you are using the ExtraView feature that allows multiple repeating records to be creating against each issue, then the fields on the repeating records cannot be updated with this facility. To use this feature:

- First, prepare a report.
- Click on the Update Issues button on the menu bar of the report.
- Select the field you want to update from the list offered to you.
- You will then see a prompt asking for the new value for the field as well as a list of all the issues that are about to be updated. You can uncheck any issue from the list that you want to exempt from the update.
- You must check the button **Generate Email** button if you want the standard notification sent for each issue being updated. The default for this is not to send email, as you may be generating a very large list of updates and hence email notifications.
- Click **Update**. Note that if you have updated a large number of issues, the process may take some time to complete.

Note: If the field you are updating is a multi-valued field or part of a repeating record that can have many values, then the update will add the new value to the existing list of values for the field you are updating.

Note: You may not be able to undo this mass update operation, so take care before pressing the **Update** button.

Note: Allowed value combinations are not used within the Mass Update feature. It is the responsibility of the user to select valid allowed value combinations when selecting values from the lists in the Mass Update screen. If an incorrect combination is selected and the user proceeds with the mass update, then it will fail.

Note: You may update issues across multiple business areas and projects, provided the value to be updated does not violate any business rule such as a field being required. **Example**: This shows how you can reassign all open issues from one person to another, for a given product: Prepare a Quicklist report that selects Business Area = Bugs and Status = Open and Assigned To a specific user as filters. From the resulting report output, press the **Update Issues** button. You will see a screen similar to:

Mass Update		Cancel	Print Page
Select field to update	* Select Field *		
		Cancel	Print Page

Selecting a field to update

Select the Assigned To field from the list and the screen will redisplay, showing something similar to:

		date		D TO) *None *				
ew va	lue I	IOF ASSI	gned To (ASSIGNE					
nchec	k any	y records	that you do not wa	nt to update to the new value				
			Current value		Business Area	Project		
View	•	10454	Bill Smith	After rebooting the processor, the screen will show a wrong module	Bugs	Bugs Data		
View	•	10373	Bill Smith	Notifications are not sent upon submission.	Bugs	Bugs Data		
/iew	•	10318	Bill Smith	This is a test	Bugs	Bugs Data		
/iew	•	10231	Bill Smith	The link from the report page "Support" button is broken	Bugs	Bugs Data		
/iew	•	10226	Bill Smith	Provision of TNCP problem	Bugs	Bugs Data		
	~	Click he	re to check or unche	ick all the issues in the list				
Ge	nerat	te Email						
							Cancel	Print Page

Mass update screen

From the select list labeled **New value for Assigned To**, select the person you want to reassign the issues to. You can view any of the issues to check whether they should be part of the update, and you can uncheck any or all of the issues. If the field you are trying to update is dependent upon another field (for example a *module* field may be dependent upon product), then you will be prompted for the parent field, then the child field, to ensure that the relationships between the values are kept intact and only valid combinations are stored. If you try to update a parent field that would invalidate the child records, for example trying to set the product field to a value that is not appropriate for a given module, you will receive an error for that issue, or issues, and these issues will not be updated.

Note: You can only update issues that are within your currently set Business Area and Project. If your search results contained any issues, or items in any other Business Area or Project of the system, they will not be updated. When ready, you can press the **Update all records** button. You will be asked to confirm that you want to update the issues. Expect the update to take one – two seconds per issue to perform the update. Updating the issues is a process that happens in the "background" of the computer server. This has a number of advantages. First, it makes the mass update process less prone to error conditions if your local computer malfunctions or crashes midway through the process, or the communications network is disrupted for some reason. Second, managing the mass update as a background process allows ExtraView to monitor for attempts for one user, or several users to start mass updates while other mass updates are still running. This can lead to data integrity or data corruption problems, and of course is highly undesirable. While the mass update is underway, you will see a progress window as follows:

Mass Update Progress	
Executing database changes, processing issue : 134/299	
Hide Mass Update Progress	
Copyright @ ExtraView Corporation, 1999 - 2007. All rights reserved. Licensed to Superior Software Corporation	
Environment - Version best_data - UNKNOWN Report problems and request enhancements at the <u>ExtraView support site</u> .	

Mass update progress bar

Note: Pressing the button to hide the progress bar, or closing the window has no effect on the execution of the mass update. As a background process, it will continue. The progress bar is purely for informative purposes. Once the mass update is complete, and assuming you have not closed the progress window, you will see a summary of the mass update, including any errors encountered. The most common error is trying to perform a global mass update across several business areas, when the field you are trying to update is not on the *edit* screen for the business area and project to which the issue belongs.

ults of Mass Update	Close Window	Print Page
Number of requested issue updates 299		
Number of issues updated 52		
ERRORS		
ID: 10010		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10018		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10029		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10032		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10037		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10042		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10053		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10057		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		
ID: 10058		
Mass Update Exception		
Exception:com.extraview.applogic.problem.ValidationException: Field Actual Time (hrs) is not in the edit layout update is skipped		

Results of a mass update, showing errors

Mass Update and Multi-Valued Fields

Multi-Valued fields are treated differently for the purpose of mass update. When you select one or more values in a multi-valued field to be updated, the selected values are added to the current values within the field. The existing field values remain untouched. If you want to replace the values in the field, first mass update the multi-valued field to a value of * **None** *, then perform the update you want to add the values to the field.

Mass Update and Repeating Rows

Mass update works with repeating rows, but there are a couple of points to consider:

- If the report from which you initiate a mass update does not include any filters on fields in the repeating rows, and you then decide to mass update one or more fields on the repeating row, then ExtraView does not have enough information to target specific repeating rows for the mass update. *All repeating rows of all the issues that are being mass updated will be updated to the value or values you provide.*
- If the report from which you initiate a mass update includes a filter on one or more fields on repeating rows, then ExtraView will only update these repeating rows during the mass update.

Mass Deleting of Issues

This utility allows any number of issues to be deleted from the ExtraView database and must be used with extreme caution. Deleted issues cannot be recovered, and you may need to restore your database from a backup to undo the effects of using this utility.

The primary use for this feature is to allow organizations who have record retention policies to be in compliance with these policied. For example some organizations may have policy that says that records more than 7 years old should be deleted.

Your site administrator may not have provided permission to your user role to run this utility. If you do have permission, a button labeled **Mass Delete Issues** will appear on the output of Quicklists and Column reports. This button invokes the utility and shows a screen similar to the following:

	ecords Cancel Print I	Page	Mass Delete
Directions			
Use this utility wit	th caution. Potentially th	ere are irreversible effects on your data.	
Select the issues	you wish to delete from	the list below, then click Delete Selected Records.	
f vou delete the h	istory of the selected is	sues, the issues cannot be recovered.	
-			
l you do not delet	te the history of the sele	cted issues, the issues may be recovered, but only with scripts applied directly to the o	latabase.
7	_		
Delete All Histo	ory ?		
Generate Emai	?		
Generate Emai	il ? ID #	Title	
		Title Misspelling on the title screen	
View	ID #		
View	ID # 10800	Misspelling on the title screen	
View View View	ID # 10800 10795	Misspelling on the title screen Monitoring status shows an error	
View View View View	ID # 10800 10795 10794	Misspelling on the title screen Monitoring status shows an error Crack in circuit board	
Generate Emai	ID # 10800 10795 10794 10793	Misspelling on the title screen Monitoring status shows an error Crack in circuit board Box insert is 2mm short	
View View View View View	ID # 10800 10795 10794 10793 10792	Misspelling on the title screen Monitoring status shows an error Crack in circuit board Box insert is 2mm short The report screen contains a blank entry	
View View View View View View	ID # 10800 10795 10794 10793 10792 10774 10767	Misspelling on the title screen Monitoring status shows an error Crack in circuit board Box insert is 2mm short The report screen contains a blank entry The sample file has an error - cloned issue test	
View View View View View View View View	ID # 10800 10795 10794 10793 10792 10774	Misspelling on the title screen Monitoring status shows an error Crack in circuit board Box insert is 2mm short The report screen contains a blank entry The sample file has an error - cloned issue test	

The same set of issues that were seen on the Quicklist or Column report are displayed, each with a checkbox allowing it to be selected or deselected for deletion. Note the checkbox at the bottom of the list at allows you to select or deselect all the issues with a single click of your mouse.

If you do not check the **Delete All History** box, the history of the issues will be retained within the database, and it may be possible, with the use of database scripts to recover the deleted issues. If you check this box, the issues cannot be recovered and are permanently deleted.

When you have made the appropriate selections for deletion, click the **Delete Selected Records** button on the menubar. You will be asked to confirm that it is OK to proceed. There will be a progress screen displayed. Once the deletion is complete, there will be a summary of the deletions made.

Email Notifications

ExtraView provides a number of powerful email notification features. As a general default, ExtraView sends email to:

- The person who Originated an issue
- The person who is Assigned To the issue
- The person who is selected to be the *Owner* of the issue
- Any other person whose name appears on the issue screen in a list field

When you observe email notification received in HTML format (the default), the fields within the notification is color coded. Unless your administrator has changed the defaults, the colors signify the following:

Black	This signifies that the value of the field that did not change when the issue was updated
Red	This signifies that the value in the field has altered in the update to the issue. Observe that in a newly recorded issue, all the fields will be colored in red
Green	This signifies that the value has changed in the last update to the issue
Grey	The value was deleted in the last update to the issue

Note: Rich text HTML Area fields are not colored within any notification. This is because they are rendered exactly as the text within the field is colored. This might include any number of colors within a single field.

A number of the email functions are accessible only by those users who have administration privileges. These include enabling/disabling email notification system-wide, disabling notification by User Role, and some of the Interest list functions. For example, only administration users can setup and manage product interest lists and field or metadata specific interest lists. Despite these restrictions, however, regular users also have a number of different options. The email functions that can be controlled by the individual user are detailed below.

Turn Notification On & Off

This allows you to turn email notification on and off for your personal account.

LOG	0	Bill Smith	Administrator	~					
LUG	U				_		-	Bugs	~
Home	Add	Query	Admin	Help	Sign Off	Search for ID #	Go		_

Navigation Bar

- From the navigation bar click on the your name and link to the **Change user's details** screen. After entering your password, select the **Notification Options** tab.
- A screen similar to the following appears:

Change user's details: BSMITH (Enabled))	Update User	Cancel	Print Page
Personal Details Personal Options Reports N	lotification Options User Roles/Security Privacy Groups			
Receive email notifications ? Receive notification on own updates ? Email format ? Receive notifications at alternative email address ?	Yes C No Yes C No HTML Yes C No			
	 All Interest Lists → Interest lists I may join → Global Interest Lists → Opt-in Customer = Bank of America → Opt-in Product = Tracker → Opt-in Product = Tracker Enterprise → Opt-in Tracker Lite Documentation Issues → Business Area : Knowledge Base → Interest lists I belong to → Clobal Interest Lists → Opt-out High Priority issues for the Tracker Product ↔ Issue Interest Lists 	t		
Escalation Rules	All Escalation Rules Scalation rules I may join Global Escalation Rules Opt-in Open Issues on the Tracker product that h Escalation rules I belong to	-	atr atr	0110-11
		Update User	Cancel	Print Page

- Set the value in Receive email notifications to "No" (If you do not want to receive email notifications from ExtraView)
- Click the Update User button.

Notify On Own Updates

This feature gives you the option to disable automatic email that you generate to yourself on issues that you *Add* or *Edit*. This minimizes the amount of email that you receive.

A screen similar to the following appears:

Change user's details: BSMITH (Enabled)	Update User	Cancel P	rint Page
Personal Details Personal Options Reports Notification Options User Roles/Security Privacy Groups			
Personal Details Personal Options Receive email notifications Provide the second	t		
Opt-in Open Issues on the Tracker product that h Escalation rules I belong to	ave not changed	in a week	
	Update User	Cancel P	rint Page

- Set the value in Notify of own updates to "No" (If you do not want to receive email).
- Click the Update User button.

Select Email Format

Choose to display incoming email in one of three formats: HTML, Plain Text (full) and Plain Text (brief). Plain Text (full) displays the entire email, while Plain Text (brief) shows just a few lines, so that the issue may be recognized. Plain Text (very brief) shows just the fields that changed when the issue was updated.

From the navigation bar, click on your name to access your personal options, enter your password and choose the **Notification Options** option. A screen similar to the following will appear:

Change user's details: BSMITH (Enabled))	Update User	Cancel Print Page
Personal Details Personal Options Reports N	lotification Options User Roles/Security Privacy Groups		
Personal Details Personal Options Reports N Receive email notifications ? Receive notification on own updates ? Email format ? Receive notifications at alternative email address ? Alternative email address ?	Notification Options User Roles/Security Privacy Groups Image: Security Privacy Groups	2	
Escalation Rules	 ⊕-Issue Interest Lists ⊟- All Escalation Rules ⊟- Escalation rules I may join ⊟- Global Escalation Rules 		
	Opt-in Open Issues on the Tracker product that h Escalation rules I belong to	ave not changed	in a week
		Update User	Cancel Print Page

The default email format is HTML. If you would like to see your email in another format, select the desired format from the Email format list. Click the **Update User** button. Below are examples of the different email formats that can be received:

ix Verified [ExtraViev	v-36656]-[P 2]-QA_V4.3	.6.2_B30_SQL_IE_Cnk-Unab	le to add new user Message (HTMI	.) _ 🗆 🕑			
Eile Edit View Insert Format Tools Actions Help							
🗼 Reply 🙈 Reply to All 🖂 Forward 🛃 🖙 🕐 🖄 부 🎽 🔺 - 🔹 🔹 A [‡] 🐁 🐵 💂							
rom: ExtraView Support [support@extraview.com] Sent: Wed 2/15/2006 9:08 PM carl@sesame.com c: ubject: Fix Verified [ExtraView-36656]-[P 2]-QA_V4.3.6.2_B30_SQL_IE_Cnk-Unable to add new user.							
				~			
Edit	Issue #	Created	Last Modified				
	36656	2/15/06	2/15/06				
Area	Status	Days Open	Changed by				
Defects	Fix Verified	1	Chinnam_Naidu Kimmidi				
Category	Cust. Sup. Issue ID #	Customer					
Product Bug		Catalytic Software					
Title							
QA_V4.3.6.2_B30_S0	QL_IE_Cnk-Unable to add (new user.					
Product	Module	Originator	Assigned To				
ExtraView	Administration	Chinnam_Naidu Kimmidi	Carl Koppel				
Found in Release	Severity	Browser	Priority				
4.3.6.2	Major	All Platforms	P 2				
Found In Build #	Database	OS	Duplicate Bug ID				
	30 All						
Requested Release	Committed Release	Branch Status	Fixed-in build #				
4.3.6.2 Description	4.3.6.2	Fixed	30				
User Id: qa Observed defect: I am unable to add ne	ble cause is that you exce	: popup message saying "Unab eded the number of available u					
On 'User Account Maintenance' page, it's displayed there are currently 12 activated licensed users and this installation is licensed for 1 users. For screen shots please view attachment.							
Comments 2/15/06 Chinnam N	aidu Kimmidi						
2/15/06 Chinnam_Naidu Kimmidi Tested on Version 4.3.6.2 Build #30 on site http://qa.extraview.net/m1-a-ms/ExtraView It is fixed and working fine. Hence changing the status to Fix Verified. 2/15/06 Ellin Tjondrokusumo I have added 20 users. I will make sure this won't happen again on the next build for catalytic. 2/15/06 Carl Koppel Ellin, can you please increase the number of users on the QA sites							
Documentation Impac N/A cc: <u>Carl Koppel</u> ;	t <u>Chinnam_Naidu Kimmidi</u> ;	Ellin Tjondrokusumo					

HTML Email within Microsoft Outlook

```
Subject: Open [#19419]: Category doesn't seem tied to Product anymore
Date: Wed, 2 May 2001 13:57:53 -0700 (PDT)
From: "ExtraView" <extraview-user@customer.com>
         To: <support@sesame.com>
ExtraView Notification for Bug # 19419
*Synopsis: Category doesn't seem tied to Product anymore
Link: http://www.extraview.net/extraviewsql/SE_Signon.FrameSet?p_case_id=19419
*Product: Dev Tools
*Originator: rlloyd
*Owner: rlloyd
*Changed By: dwong
*Priority: 1
 Severity
*View: Private
*Last Modified: 02-MAY-2001 13:57
*Category: Software
 Alt ID:
 Created: 02-MAY-01
*Module: ExtraView
 Component:
*Platform: all
 0S:
 Clarify ID:
 Test Case ID:
Test Case Location:
 Problem Reproducible in SQA:
*Version Open: 3.1.2.1
*Status: Open
 Version Closed:
 Disposition:
*Description:
If you select Product=EV, Category=Software, you will see two modules called "EV". Go into Admin...Modules and one is Hardware, one is Software.
       Go into Admin...Modules and one is Hardware, one is Software.
 Comments:
ExtraView - Copyright Sesame Technology 1999, 2000. All rights reserved.
```

Plain Text (Full)

```
Subject: Open [#19419]: Category doesn't seem tied to Product anymore
Date: Wed, 2 May 2001 13:57:53 -0700 (PDT)
From: "ExtraView" <extraview-user@customer.com>
         To: <support@sesame.com>
ExtraView Notification for Bug # 19419
*Synopsis: Category doesn't seem tied to Product anymore
Link: http://www.extraview.net/extraviewsql/SE_Signon.FrameSet?p_case_id=19419
*Product: Dev Tools
*Originator: rlloyd
*Owner: rlloyd
*Changed By: dwong
*Priority: 1
 Severity
*View: Private
*Last Modified: 02-MAY-2001 13:57
*Category: Software
 Alt ID:
 Created: 02-MAY-01
*Module: ExtraView
 Component:
*Platform: all
 0S:
 Clarify ID:
 Test Case ID:
 Test Case Location:
 Problem Reproducible in SQA:
*Version Open: 3.1.2.1
*Status: Open
 Version Closed:
 Disposition:
*Description:
If you select Product=EV, Category=Software, you will see two modules called
"EV". Go into Admin Modules and one is Workshow will see two modules called
       Go into Admin...Modules and one is Hardware, one is Software.
 Comments:
ExtraView - Copyright Sesame Technology 1999, 2000. All rights reserved.
```

Plain Text (Brief)

Email Options

It is often useful to have ExtraView notify you at a different email address as an alternative, or as addition to your principal email address. Your principal email address is managed through the tab named **Personal Details**. To set up an alternative email address, such as a pager, use the **Notification Options** tab on the screen. You can both set an alternative email address as shown, and you can turn it on and off as needed.

Disable Automatic Email Generation

Each time you add or edit a issue, you have the opportunity to halt all email generation by un-checking the Generate Email checkbox at the bottom of the Add and Edit screens.

1	Actification Generate Email CC Email	<u>a</u>	7
	Inch servicioner users in notification Mailing List 🧟 George Miller ; M	tery Brown	F
	Update Delete Clone Add to Interest List	Manage Relationship Groups Email History Close Print Page	
5	and the second	and the second	Γ.

Edit Issue screen

CC Mail

Each time you add or edit a issue, you have the opportunity to send a one-time, cc mail to any named users in the system or to any other person. To send cc mail, either click the people icon located beside the CC **Email** field, and select the named users you would like to receive the notification, or enter an email address in the **CC Email** field.



Edit Issue screen

If you are entering multiple email addresses, you can use a space character, a semi-colon character or a comma between the email addresses.

Note: The Generate Email checkbox must be selected in order to send CC email.

Email Interest Lists

Interest lists can be based upon issues, or upon the value of fields within issues. Here are some examples of interest lists:

- Assuming a user has permission, they may place themselves on the interest list for an issue, thereby assuring that they will receive notification of all changes to the issue, no matter who makes the change
- An interest list may be defined which is based upon the value of one or more values within the issues. For example, the Product Manager may place himself upon an interest list so they will receive notification on any issue that has their product selected; another example may be that an Account Manager may want to see all the issues regarding their customer; another example may be that the General Manager may want to see all high severity issues from a number of customers.

Email notifications are automatically generated to the owner of the issue and the assigned person of the new issue entered. If you are changing the state or other information related to an issue, then email is sent to the owner, the originator and the person assigned to the issue. If any of these values are the same, only one email will be generated per person. In addition, users can subscribe to an interest list for any issue.

Issue Interest Lists

Two mechanisms exist for manipulating issue-based interest lists. Assuming the administrator has granted you permission, you will see a checkbox when adding or updating an issue, within the Notification section of the screen. To place yourself on the interest list for the issue, simply check the box. To remove yourself, uncheck the box.



Issue-based interest lists

You may also remove yourself from your personal issue-based interest lists from your **Account**: menu bar option by choosing the **Notification Options** entry. From there, you can opt-in or opt-out of any issue-based or other interest list.

Change user's details: BSMITH (Enabled)	Update User Cancel Print Page
Personal Details Personal Options Reports Notification Options User Roles/Security Privace	y Groups
Enail format ? HTML No Notify on own updates ? Yes No Interest Lists - All Interest Lists - Interest lists I may join - Global Interest Lists - Bugs - Stabul Interest Lists - Interest lists I belong to - Global Interest Lists - Optout Issue 10231 - Optout Issue 10455 - Optout Issue 10459 - Optout Issue 10460 - Optout Issue 10461 - Escalation Rules - Bugs - Customer Issues	
Opt-out Escalate Open, P 1 issues for the Tracker product if th Opt-in Issues marked Fixed must be dealt with inside a one-v	
	Update User Cancel Print Page

Opt-in and Opt-out from interest lists

Field-based Interest Lists

Field-based interest lists provide the purpose of notifying you when a value, or combination of values, on any issue being updated, have specific values. For example, interest lists could be established to notify users upon the following circumstances:

- When the **Priority** of the issue is *P* 1
- When the **Product** is *Tracker* and the **Customer** is *ABC Corp*
- When the Status is *Fixed* and the Module is *Database*

The administrator will have established interest lists as appropriate for you installation, and there may be some interest lists which are fixed and to which you cannot alter your subscription. However, there may be some interest lists to which you can either opt-in or opt-out, at your own discretion. When you look at your interest list, you can click on the **Opt-in** or **Opt-out** button by each interest list entry, to achieve this.

Custom Email

The custom email feature allows the ExtraView user to send email notifications (using templates or a custom email that you compose) to a list of email addresses generated by means of filters. For example, an organization might decide to have internal users (who create customer issues in ExtraView) always enter the customer's email address in an email text field that can be made to appear on the Add Issue screen layout. If someone in customer support or marketing then wanted to send batch mail to all customers associated with a certain set of issues, the ExtraView user can drill down to a given issue's edit screen, and then click the **Email** button to activate the feature, select filters to generate the email list, select a template, or write a custom mail, and then send the message.

To Create Custom Email

Click the **Email** button from an appropriate issue's Edit screen.

ſ	Notification Generate Email	CC Email	2	
l	Include self on interest list	Mailing List 🖉 <u>George Wer</u>	Mary Brown	
l	Include Customer users in notifica	ation		
			Clone Email History Close Print Page	J.
5	the second se	and the second sec	and the second	

Issue Edit screen

The following screen appears:

nd Email Cancel Print Pag	je -				Custom Email
Directions					
	, or compose a new email by entering tex mail addresses as needed. The email you				cted from the mailing list. You
ou may upload attachments	to send out with your email. Attachments	will also be added into the is	sue associated wit	h the email.	
15.4	40722 T 14 C 1 14 1				
ID #	10733 - Test the time to load the adm	in screen			
Enter addresses, one per line			$\langle \rangle$		
dditional email addresses ?	* None *				
	Sally Hunt John Customer Bill Smith				
CC Email addresses ?			2		
Subject line ?	Thank you for your submission				
Select email template ?	New feature request thank you		_		
end standard notification ?					
Email body ?	Source 🛱 🐰 🗅 🖨 🛱	🛱 🔺 🖈 Styles	• Normal •	Font - Size	- <u>A</u> - <u>D</u> - <u>55</u>
	BIUS×2× ² Ix	:= 准 把 99 以	E = = =		
	Dear \$\$ORIGINATOR\$\$:				
	Thank you for your submission, sugges \$\$DUE_DATE\$\$. If you have any ques				
	Thank you,				
	Customer Support				
	LOGO				
220 T A	div p				
Attachments					
Add Thumbnail	File Description	File Name	File Size	Created By	Date Created

Custom Email screen

- 1. Enter email addresses to which you want to send the email in the text area with the title **Enter addresses**, **one per line**. Additional addresses (these are ExtraView users), may be selected from within the area titled **Additional email addresses**.
- 2. You can use the **CC Email addresses** to enter or select additional people to whom you would like to send a copy of the email.
- 3. The **Subject line** is required.
- 4. You can either enter the text to send into the text area of the screen, or you can choose an email

template from the pick list, and the template text will populate directly into the email body. Note that the email body allows you to enter and edit the text as HTML, using the toolbar above the field. For full details on how to use the editor, see Appendix B of this guide

- 5. To create custom mail that you enter directly, type the desired content into the email body field. When you select a template, there is a warning if you already have text in the email body, ensuring you only overwrite the body deliberately. You may use \$\$ on either side of a database field name (e.g., \$\$CATEGORY\$\$) and the value selected in the original issue will populate the email text when it is sent. For a full list of field names that you can use, ask your system administrator for a list
- 6. You may include image fields and document fields as part of a custom email. When you place the field name of either of these field types into a custom email (e.g. **\$\$MY_DOC_FIELD\$\$**, then the name of the document or image file is placed into the email body in place of the token, and the image or document is added as an attachment to the outgoing email notification.
- 7. Check the box titled **Send standard notification** if you want the standard email notification to be sent in addition to the custom email you are preparing on this screen.
- 8. If you are editing an issue, you may add an attachment from the list displayed. This functionality is not available when adding a new issue.

Note: The database names selected for use within the email tags must be fields that appear on the Edit screen layout, or else they won't return any data.

Note: Once your email has been sent, it is appended to the issue as an attachment.

Querying

The Query screen allows you to quickly create and ad-hoc report and present the results on a Quicklist or a Detailed Report.

There are two types of f	iltering, using the St	tandard Ouery Filters of	or the Advanced Query	Filters.

Run Report Clear All P	rint Page			ExtraView Query 🔋
V Query Options				
 Quicklist Report ? Detailed Report 		Condensed Query Filters Expanded Query Filters	 Standard Q Advanced Q 	uery Screen ? Query Screen
Output ?	Browser			
	20 rows per page 🗸 🗸			
Saved Filters ?	* Saved filter list * V Save / U	pdate Filters		
Query Filters			Filter	Multi-Valued Field Values ?
Business Area * Any *	✓ Last Changed By		Days Since Last Updated	
Keywords	tachments?		Days Since Created	
Category * Any *	Status	* Any * 🗸	Originator	
Product * Any *	Customer Name	* Any * ~	Assigned To	

Standard Filters on Query Screen

Run Report Clear Al	II Print Page			ExtraView Query 🔋
V Query Options				
 Quicklist Report Detailed Report 	1	Condensed Query Filters ? Expanded Query Filters	7	 Standard Query Screen ? Advanced Query Screen
Output ?	Browser	~		
	20 rows per page 🗸 🗸			
Saved Filters ?	* Saved filter list * V	pdate Filters		
Query Filters				Filter Multi-Valued Field Values ?
S	Select Field		Operator	Value
88	Business Area(AREA)	× _	equals V	Customer Issues ~
and V	Last Modified(TIMESTAMP)	\checkmark	during ~	Last 4 weeks

Advanced Filters on Query Screen

You can also select options to allow you to use either <u>Condensed Query Filters or Expanded Query Filters</u> as well as <u>saving your current filters</u> for reuse at a future time.

Query Filters

Selecting query filters will impose restrictions upon the report being produced and return a set of results that matches the filters you set. For example, if you select the **Status** *Open*, then only open issues will be displayed. Filters can be combined together, for example to show *Open* issues for the product named *XXX* that have been updated in the last 7 days.

Filter Options

There are potentially four options that you can apply when creating filters. They do not all appear all the time according to how your administrator has configured the site and according to other options chosen.

- Filter Repeating Row Values If present, this setting controls the results returned by the query when the query filters contain one or more repeating row fields. If checked, only the rows that match the filter criteria will be returned. If not checked, all repeating rows are returned by the query, where at least one row matches the filter criteria
- Filter Multi-Valued Field Values When this option is checked, ony the selected values in multi-valued list fields will be returned and displayed by the query, with all other values being suppressed
- Use Allowed Values in Filters When this is checked, and you select a filter of a parent field in an allowed valued relationship and then subequently select a filter of the child field in the allowed value relationship, only the valid child values will be displayed. This does not apply if you choose the child value before you choose the parent value. Also note this is not operable for the Business Area and Project fields, where all values will always be displayed
- Allow Additional Keyword Filters If you check this option, then a keyword search box is displayed on the query output. You may enter additional search keywords within the search box on the output and these will be applied to the query and the query rerun with this keyword in addition to other filters.

Saving Filters for Future Use

After setting up filters, you may want to save them for future recall. To achieve this, simply use the **Save** / **Update Filters** button. After saving the filters, you can recall them by selecting the name you used in the select list. Saved filters may be personal, and with permission you can save them to be shared by all users. These saved filters are independent of the reports saved within ExtraView, although you can include any saved filters within a report that you create.

Run Report Clear All	Print Page		ExtraView Query ?
V Query Options			
Quicklist Report Potailed Report		 Condensed Query Filters Expanded Query Filters 	Standard Query Screen ? Advanced Query Screen
Output ?	Browser	~	
	Unlimited rows per page	~	
Saved Filters ?	* Saved filter list *	Save / Update Filters	
Query Filters	Personal filters Helpdesk Issues My filters	Filter Child Values ?	Filter Multi-Valued Field Values ?
Business Area • Any • ID #	TIC	ct * Any *	Days Since Last Updated
Priority * Any *	Hot Items Recent Aditions	Search Attachments?	Assigned To * Any *

Saving filter sets

		$\overline{\mathbf{X}}$
Save/Update/Delete Filt	ers	Save Delete
	ers, enter the name and press the Save button. To t from the list and press the Save button. To delete and press the Delete button.	
Replace existing filter se Create new filter se		

Dialog for saving filters

Using the popup dialog, you can also delete an existing filter set.

There are a few caveats on the use of saved filter sets:

- You may save either Standard or Advanced query filters, and on the Query screen, they will be recalled in the same manner they were saved
- Saved filters may only be recalled within a report editor, when you are in Advanced query mode. However, if you recall a set of Standard filters when you are in the Advanced mode, they are converted to Advanced filters
- When in a report editor, and you are in Advanced query mode, you may save your filters. If you are using a report hierarchy, the filters will be saved and can be used in any report editor, but will not be

visible on the Query screen where reporting hierarchies are not supported

• Within a report editor, you can either recall a set of saved filters to replace all the current filters, or can recall a set of saved filters to be inserted at any point within the filters currently chosen. To replace all the filters, simple choose from the * Saved Filter List *, to insert a filter choose the option within the field list titled * Insert Saved Filters *:

Run Report Save Report Save As Schedule	Report Delete Report Clear All Cano	el Print Page		ExtraView Column Report
Column Report Options				
Report title Customers and their Issues	?			
Description Uses Hierarchical Reporting				
Browser	~	Condensed Query Filters	Use SL	A ? * None *
		O Expanded Query Filters	Transpose rows/co	
20 rows per page V		OStandard Query Screen	Display on Mobi	-
Customers>Issues ~		Advanced Query Screen	Output Report Definitio	
* Saved filter list *				
Saved filter list	Save / Update Filters			
Drag or double-click fields to select, drag		Drag or double click up to		
Find a field	Show field names	Find a field	Show field names	
Abstract	Customer Name	Actual Renewal Date	□ ID #	
Actual Renewal Date	Customer Contact	Actual Time (hrs)		
Actual Time (hrs)	Phone Number	Application		
Address Application	Customer Email	Approved by Asset Type		
Approved by		Assigned To		
Asse Select	~	Automated		
Asse * Insert Saved Filters *		Building		
Assid Actual Renewal Date(CUST_CONT_ACT	_REN_DATE)	Bus. Priority		2 2
Attac Actual Time (hrs)(TIME_ACTUAL)		Business Area		
Auto Application(IT_APPLICATION) Approved by(IT_APPROVED_BY)		Case Status		
Disp Asset Type(IT_ASSET_TYPE)				
Assigned To(ASSIGNED TO)				
Que Automated(AUTOMATED)			Filter M	lulti-Valued Field Values ?
Building(IT_BUILDING) Bus. Priority(FRQ_BUSINESS_PRIORITY				Allowed Values in Filters 2
	1)		0307	
Case Status(TEST_CASE_STATUS)				
Category(CATEGORY)	0	perator Value		
Cell Phone(CUST_PHONE_CELL) Committed Release(FRQ_COMMITTED	DELEASE			
Committed Release(RELEASE_FIXED)	RELEASE)			
VISS Contact Phone(IT_CONTACT_PHONE)		Perform aggregate function on results	? Include parents without children ?	
Contact(CONTACT)		Select Field		perator Value
Find a Contract Date(CUST_CONTRACT_SIGN_DATE)				
Abstra Contract Number(CUST_CONTRACT_NUM) Actual Created Start Date(START_DATE)		Business Area(AREA)	e	quals 🗸 Customer Issues 🗸
Created Stop Date(STOP_DATE)				
Actual Created from ID #(CREATED_FROM_BU Addre: Customer Contact(CUST_CONTACT_NA				
Applic Customer Email(CUST_CONTACT_NA	anc)			
Appro Customer Name(CUST_LIST)				
Asset Customer Name(CUST_NAME)				
Asset Date Closed(DATE CLOSED)				
Date Created(DATE_CREATED)	×	and the second		

Saved Filters within a Hierarchical Report Editor screen

• You are warned if you are about to overwrite current filters with saved filters and given the opportunity to cancel.

Note: With Advanced Filters only, you can create saved filters where the fields have the value of * **Any** *. Whereas filters with the value of * **Any** * are typically ignored, and discarded when saved, there is a purpose to this feature. Consider that you might have a set of many filters that you want to use frequently as you create reports. These reports may or may not require all the filters, but you want them to be easily available when creating these reports. This provides a rapid way to construct the filters for these reports.

Standard Query Mode

This allows you to choose the values for fields, upon which records are selected for the report. There is a set of filters available directly on the Query / Report screen, as well as from the screens where you prepare or edit reports that you save for future use. Typically, the Query / Report screen will show the most common filters you use, while the remaining screens show a more complete set of filters to which you have access. The fields available for your use are set up by your administrator.

Query Options Quicklist Report Detailed Report Output Provide the second				
Contract Report C				
20 rows per page V				
Saved Filters ? Saved filter list * V Save / Update Filters				
Query Filters Filter Multi-Valued Field Values ?				
Business Area * Any *	Days Since Last Updated			
Keywords	Days Since Created			
Search Attachments? Category * Any * Status * Any *	Originator			
Category * Any * Product * Any * V Customer Name * Any *				

Standard query filters

If a query filter you select is the parent in a relationship, for example, the *Module* field may be dependent on the *Product* field, then the screen will refresh, and the child field will be populated with the valid entries for the parent you selected. If your administrator has enabled the feature that allows you to search for inactive users, an additional prompt appears on the screen alongside the Query Filters heading. This is a checkbox with the label **Show Inactive Users**. When you check this, all the selection lists of users, will be refreshed, and will show inactive as well as active users, allowing you to perform searches for users who were at one time, but are not currently, licensed users of ExtraView. Note that this feature only works in Standard Query mode, and is not operable in Advanced Query mode.

Advanced Query Mode

If your administrator has given you access to advanced query mode, you first will select an individual *field* as the first filter to use in selecting individual records for the report. Then you select an *operator* such as "equals" or "greater than", and then you select the *value*. For example, a filter may be: Status not equal to Closed You may add as many filters as you like, with each one beginning with a conjunction such as "*and*" or "*or*". Advanced filters take a little longer to set up than standard mode filters, but they allow much more flexibility to create a complex set of query filters.

Run Report Clear All	Print Page		ExtraView Query 🛛
▼ Query Options			
 Quicklist Report ? Detailed Report 		 Condensed Query Filters Expanded Query Filters 	○ Standard Query Screen ? ● Advanced Query Screen
Output ?	Browser	\checkmark	
	20 rows per page		
Saved Filters ?	* Saved filter list * V	/ Update Filters	
Query Filters			Filter Multi-Valued Field Values ?
Sel	ect Field	Operator	Value
Bu	isiness Area(AREA)	🖌 🖂 equals 🗸	Customer Issues
and V La	st Modified(TIMESTAMP)	during	✓ Last 4 weeks ✓

Advanced filter selection

To add a new filter, use the 🖶 button. Note that you can add filters following any existing filter. If you want

to delete an individual filter from a query, use the **b**utton. This will eliminate the filter. In advanced mode, you can set the same filter field multiple times and use the "**or**" value. For example, you may set two filters as follows

Priority equals P1 or Priority equals P2

Alternatively, you can use the Expanded search mode described below, and select multiple values from the Priority list.

Advanced Query Filter Operators

The operators that appear in the drop down list are sensitive to the display type of the field you select. This allows you to select operators that only make sense and are eligible for each field display type. This table shows how this operates:

Field display type	Operator values in Condensed Filter Mode	Operator values in Expanded Filter Mode
Currency, Decimal, Number	Equals	Equals
	Greater than	Greater than
	Less than	Less than
	Not equal	Not equal
	Less than or equal to	Less than or equal to
	Greater than or equal to	Greater than or equal to
	Empty	Empty
	Not empty	Not empty
Checkbox, List, Pop-up, Tab,	Equals	Equals
User	Not equal	In
		Not equal
		Not In
Date, Day	Equals	Equals
	Greater than	Greater than
	Less than	Less than
	Not equal	Not equal
	Less than or equal to	Less than or equal to
	Greater than or equal to	Greater than or equal to
	Between	Between
	Empty	Empty
	Not empty	Not empty
	During	During
	After	After
	Before	Before
	After or during	After or during
	Before or during	Before or during
Keyword	Contains	Contains

Text Field

Equals Contains Not Equal Empty Not Empty Equals Contains Not Equal Empty Not Empty

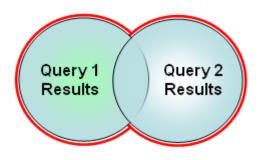
The operator values are largely self-explanatory, but a word of explanation is needed about the Empty and Not Empty values. When a numeric field (currency, decimal or number display types) is stored in ExtraView, and you do not enter a value, zero is not the value stored. A null, or empty value is stored and these are treated differently. Therefore searching for a value of empty will retrieve a different set of results that searching for a value of zero. Also, note that for Checkbox, List, Pop-up, Tab and User fields when in Expanded Query mode, there are two additional operators, In and Not In. These allow you to define a list of values to search for that must be present or must not be present. If you want to search for both empty and zero values, you may combine two filter conditions together, as exemplified by the following: **Amount** *Equals* 0 or **Amount** is *Empty*.

Fields with a display type of Date and Day present different options for their values, according to whether an arithmetic operator such as *equals* or *greater than* is chosen, or a duration such as *during* or *after* is chosen. When an arithmetic operaor is chosen, you may enter dates into one or both date value fields. When you choose a duration, you are presented with a list of durations such as *last month, this fiscal quarter* and *this month to date*. ExtraView understands the meaning of these durations and will filter your query or report using the duration you select.

Advanced Query Filter Conjunctions

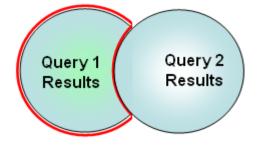
The following conjunctions can be used between the different filters of a report:

Conjunction	Meaning
and	This filter will ensure that both filter conditions on each side of the and are true, before including the results
or	This filter will include results from the search, if either of the conditions on each side of the or is true
union	This will take the results of all the filters together preceding the conjunction union , together with the results of the filters in the query following the conjunction, and merge the results of both queries. For example, if you union two queries together, then you will see the results of both queries being returned on the report. The area within the red outline shows the results returned by two queries using the union conjunction.



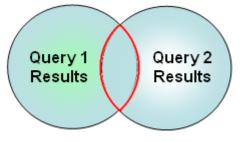
This will take the results of the query filter(s) before the conjunction **minus**, and remove all results in common with the results of the query filter(s) following the conjunction. For example, if the query before the **minus** returns 100 rows, and the query following the minus returns 60 rows, 30 of which are to be found in the first part of the query, you will see 70 rows on the report that is generated. The area within the red outline shows the results returned by two queries using the **minus** conjunction.

minus



This will take the results of the query filter(s) before the conjunction **intersect**, and only display the results that are in common with the results of the query filter(s) following the conjunction. For example, if the first part of your query before the **intersect** returns 100 rows, and the second part of the query after the **intersect** returns another 100 rows, and 30 of the results are in both parts of the query, you will see these 30 rows returned on the report. The area within the red outline shows the results returned by two queries using the **intersect** conjunction.

intersect



If your ExtraView installation is running on a Microsoft SQL Server database prior to the 2005 version or on the MySQL database0 not all the conjunctions are functional due to database limitations. Only conjunctions that are known to work are operable. Check with your administrator if you are not certain which database is used by your company. If you have more than one **union, minus** or **intersect**

conjunction in a query, then the filters up to the first one that contains the conjunction are grouped together. The order in which you choose filters is significant if you choose to use the "**or**" conjunction in your query. The rules for parsing the queries are as follows, with the parentheses showing the precedence.

Order of conjunctions	Significance
One " or " as the last filter	The condition in the filter with the " or " is used over the whole query. For example: Product equals XYZ and Priority equals P 1 and Status equals Open or Severity equals Severe This query is parsed as follows: (Product equals XYZ and Priority equals P 1 and Status equals Open) (or Severity equals Severe)
One " or " that is not the last filter	The "and" operators take precedence over the "or" operator. For example: Product equals XYZ and Priority equals P 1 or Priority equals P 2 and Severity not equal Severe This query is parsed as follows: (Product equals XYZ and Priority equals P 1) (or Priority equals P 2 and Severity not equal Severe)
There are multiple "and" and "or" filters	Once again, the "and" operators take precedence over the "or" operators. For example: Product equals XYZ and Priority equals P 1 or Priority equals P 2 and Severity not equal Severe or Severity not equal Major This query is parsed as follows: (Product equals XYZ and Priority equals P 1) (or Priority equals P 2 and Severity not equal Severe) (or Severity not equal Major)

Note: You can toggle between standard search mode filters and advanced search mode filters at any time, but the filters currently on the screen are reset. Filters are not lost when you change between condensed and expanded filters.

Allowed Values and Advanced Queries

Allowed values do not operate within filters selected for advanced queries. You will see all the parent and all the child values in the filter lists for these queries.

Querying for Inactive Values

Within Advanced Search lists, an entry * **Show disabled values** * will appear in any list that contains values that have been disabled by the administrator. For example, you may wish to search for issues where the *originator* of the issue has left your company and their account has been disabled. If the field contains any values that are disabled, then you can select * **Show disabled values** * and the screen will refresh, showing all the disabled values. You can revert to only displaying enabled values with the prompt * **Do not show disabled values** * that will now be in the list.

Querying with Date / Time Functions

Day and Date display type fields have two basic ways in which they are used as query filters, depending on the operator you select.

Operator	Functionality
----------	---------------

Equals Greater than Less than Not equal Less than or equal to Greater than or equal to Between Empty Not empty	When you choose one of these operators, two date input fields appear, each with a popup calendar. Depending on the operator you select, you will enter a date (and potentially time) into none, one or the two fields. When you select <i>Equals, Greater</i> <i>than, Less than, Not equal, Less than or equal to</i> , or <i>Greater than or equal to</i> then you only enter a date into the first field. When you select <i>Between</i> , you enter two dates. If you select <i>Empty</i> or <i>Not empty</i> , then you do not enter any date valuesWhen you choose one of these operators, you are presented with a number of date / time expressions which complete the filter. The list of valid expressions and their meanings is as follows. This table assumes that today's date is Sunday, February 20th 2015 and the fiscal year setting of your installation starts on January 1.			
During After Before After or during Before or during				
	Title	Data dictionary field name	Expression resolves to	
	Last 4 weeks	EVDTF_LAST_4_WEEKS	January 25th 2015 - February 14th 2014	
	Last 7 days	EVDTF_LAST_7_DAYS	Febraury 13th 2014 - February 19th 2014	
	Last fiscal quarter	EVDTF_LAST_FISCAL_QUARTER	October 1st 2014 - December 31st 2014	
	Last fiscal year	EVDTF_LAST_FISCAL_YEAR	January 1st 2014 - December 31st 2014	
	Last fiscal quarter to date *	EVDTF_LAST_FQ_TO_DATE	October 1st 2014 - November 20th 2014	
	Last fiscal year to date *	EVDTF_LAST_FY_TO_DATE	January 1st 2014 - February 20th 2014	

11		
Last month	EVDTF_LAST_MONTH	January 1st 2015 - January 31st 2015
Last month to date	EVDTF_LAST_MONTH_TO_DATE	January 1st 2015 - January 20th 2015
Last quarter	EVDTF_LAST_QUARTER	October 1st 2014 - December 31st 2014
Last quarter to date	EVDTF_LAST_QUARTER_TO_DATH	October 1st 2014 - November 20th 2014
Last week	EVDTF_LAST_WEEK	February 8th 2015 - February 14th 2015
Last week to date *	EVDTF_LAST_WEEK_TO_DATE	February 8th 2015 - February 13th 2015
Last year	EVDTF_LAST_YEAR	January 1st 2014 - December 31st 2014
Last year to date	EVDTF_LAST_YEAR_TO_DATE	January 1st 2014 - February 20th 2014
Next 4 weeks	EVDTF_NEXT_4_WEEKS	February 22nd 2015 - March 21st 2015
Next 7 days	EVDTF_NEXT_7_DAYS	February 21st 2015 - February 27th 2015

Next fiscal quarter	EVDTF_NEXT_FISCAL_QUARTER	April 1st 2015 - June 30th 2015
Next fiscal year	EVDTF_NEXT_FISCAL_YEAR	January 1st 2016 - December 31st 2016
Next month	EVDTF_NEXT_MONTH	March 1st 2015 - March 31st 2015
Next quarter	EVDTF_NEXT_QUARTER	April 1st 2015 - June 30th 2015
Next week	EVDTF_NEXT_WEEK	February 22nd 2015 - February 28th 2015
Next year	EVDTF_NEXT_YEAR	January 1st 2015 - December 31st 2015
This week to date	EVDTF_THIS_WEEK_TO_DATE	February 15th 2015 - February 20th 2015
This fiscal quarter	EVDTF_THIS_FISCAL_QUARTER	January 1st 2015 - March 31st 2015
This fiscal year	EVDTF_THIS_FISCAL_YEAR	January 1st 2015 - December 31st 2015
This fiscal quarter to date	EVDTF_THIS_FQ_TO_DATE	January 1st 2015 - February 20th 2015
This fiscal year to date *	EVDTF_THIS_FY_TO_DATE	January 1st 2015 - February
		· · · · ·

		20th 2015
This month	EVDTF_THIS_MONTH	February 1st 2015 - February 28th 2015
This month to date *	EVDTF_THIS_MONTH_TO_DATE	February 1st 2015 - February 20th 2015
This quarter	EVDTF_THIS_QUARTER	January 1st 2015 - March 31st 2015
This quarter to date	EVDTF_THIS_QUARTER_TO_DATE	January 1st 2015 - February 20th 2015
This week	EVDTF_THIS_WEEK	February 15th 2015 - February 21st 2015
This week to date *	EVDTF_THIS_WEEK_TO_DATE	February 15th 2015 - February 20th 2015
This year	EVDTF_THIS_YEAR	January 1st 2015 - December 31st 2015
This year to date	EVDTF_THIS_YEAR_TO_DATE	January 1st 2015 - February 20th 2015
Today	EVDTF_TODAY	February 20th 2015
Yesterday	EVDTF_YESTERDAY	February 19th 2015

* These expressions are not commonly used. If you require to use these, ask your administrator to turn them on within the data dicationary by setting the **Filter Criteria** of the expression fields to *Yes*.

Querying for Multiple Issue Numbers (ID's)

On the Search/Report screen, you can type multiple issue ID's into the Issue ID field. Separate these by a semicolon ';'.

Querying for Null or No Values

There are occasions when it is useful to be able to search for a null value, or the absence of a value. For example, you may want a report where the filter is to be "show me all the records that have an empty customer field". If the field is a list field, you can select the entry * **None** *. If the field is a text field, however, you can enter the character string {**null**}, to signify that you are looking for a null.

Querying with User Name Fields

User fields have two options related to their ability to search, using the selected value or values as filters. First, there is an entry within the search list, * **Current User** *. When this entry is selected, the name of the user currently signed in is used as the filter value. If your administrator has enabled the option, there may also be an entry in the list, * **Include Inactive Users** *. By default, each list of users only includes activated users. When you select this option, the screen refreshes and the user list will include both active and inactive user names. If your installation uses pop-up selection for users, a checkbox will allow any search you make, to include inactive user names.

Querying with Checkbox Fields

Checkboxes are odd in their behavior. This is because you, the user sees them as *unchecked* and *checked*. However, the underlying databases upon which ExtraView relies also sees them as not being set at all. To the databases, this is different value, termed a "*null*" value. Therefore checkboxes have three potential values, *null*, *unchecked* and *checked*. As far as possible, ExtraView treats the *null* value as being the same as *unchecked*. However, once a checkbox is *checked*, and then subsequently *unchecked*, its value remains as *unchecked* and never goes back to *null*. Querying for a value of *unchecked* within a checkbox, will also include looking for the *null* value.

Runtime Replacement Filters

Both Container Reports and Dashboard Reports provide the opportunity to run multiple reports that give a single, combined output. Each individual report within Container Reports and Dashboards may, and probably will, have their own filters. However there are times where it can be useful to apply a single set of runtime filters to all the reports. Container Reports and Dashboard Reports give the opportunity to provide runtime replacement filters that are applied to all the reports on their output.

For example, you might want to apply a runtime replacement filter that applies the same date range to all the output, or apply a filter that provides only results from a specific product within the output.

When you specify runtime replacement filters within a Dashboard Report or Container Report, they will replace filters for the same field within the individual reports that they contain. If a runtime replacement filter at the Dashboard or Container report level does not appear within the contained report, it will have no effect. Further, it is not possible to specify conjunctions for the global filters - they simply replace filters

for the same field within the contained reports. The runtime replacement filters are always displayed in expanded mode, allowing you to make multiple selections within a field.

Tip: A typical use case might be to create a dashboard that contains several reports about all your products, but you want to filter on the report output by a single product. You cannot select a runtime replacement filter with a value similar to Product = Any, but you can select all the product values in the list and store that as your filter. Then, after viewing the dashboard, you can select a new filter value that is either just one, or a selection of products.

Quicklist Reports

Quicklists are reports where the format (i.e. the fields that are displayed) is prepared by your administrator. Typically this report is designed to show you the most important and most frequently accessed fields. Selecting **Run Quicklist Report** and pressing the **Go** button will generate a report using the filters selected on the screen in the Query Filter section. The resultant report can be sorted by any of the fields displayed, with a single mouse click. Quicklists are ideal for selecting a group of records for further examination. For example, a manager might want to create a Quicklist of newly submitted issues, and then view or edit each in turn, in order to assign them to the appropriate person. Additionally, a manager could create a Quicklist of all the issues with an Open status, in order to see the average number of days in status for purposes of assessing efficiency or resource allocation.

Business Area = Prepared by Bill \$	1 C C C C C C C C C C C C C C C C C C C	Project = Helpdesk Dat	a AND Status = Open				
	ID # ▼	Business Area	Title =			A Mar Alexan	
 Image: A set of the set of the	Priority =	Project =	Status =	Request Date =	Due by =	Application = Assigned To =	
					Due by •	Microsoft Outlook	
View Edi		Helpdesk	New chair for the office	5			
Hist Qed	t P2	Helpdesk Data	Open	07/13/2007		Chris Robinson	
View Edi	10527	Helpdesk	Authorization to provi	de new furniture for new employe	e - Frank Bell		
Hist Qed	t P3	Helpdesk Data	Open	04/19/2007		Jimmy Duncan	
View Edi	10518	Helpdesk	Authorization to provi	de new furniture for new employe	e - Gloria Menendez		
Hist Qed	t P3	Helpdesk Data	Open	04/13/2007		Jimmy Duncan	
View Edi	10517	Helpdesk	Authorization to provi	de a new telephone extension for	new employee - Gloria Men	endez	
Hist Qed	t P3	Helpdesk Data	Open	04/13/2007		Mary Brown	
View Edi	10516	Helpdesk	Authorization to provi	de a new computer for new emplo	yee - Gloria Menendez		
Hist Qed	t P3	Helpdesk Data	Open	04/13/2007		Mary Brown	
Count: 5 records							

Quicklist Report

Quicklist reports may be sorted on any field in the title, by clicking on the title. When you first click on a field, the report is resorted, using the field you selected in an ascending order. Clicking on the title a second time will resort the report again, this time using the field in a descending order. If you sort on one field, then choose a different field to sort the report on, the first field is still used in the sort order, but secondary to the field you just clicked on. If your administrator has enabled the option, a button named **Turn On Record Selector** will be on the menu bar of the Quicklist report. The function of this button is to allow you to see a selector by each record on your Quicklist report. When you use the selector to choose records from the Quicklist report, you can then perform one of the following mass operations on the selected records:

- Produce a Detailed Report with the selected records
- Perform a Mass Update of the selected records
- Export the results to local file on your computer, in a variety of formats

View other areas of this guide for information on each of these features. Turning on the record selector alters the Quicklist report by displaying a checkbox by each record, as shown on the following screenshot. Click on the checkbox to select each record. You can turn off the record selector with the button **Turn Off Record Selector** on the menu bar. To execute one of the mass operations, simply click on the appropriate button on the menu bar. You may also select all the records on the page by checking the box by the prompt **Click here to check or uncheck all the records on the page**.

		lir on 03/25/20 ck or uncheck	014 all the records on this	page				
/		ID#▼	Business Area =	Title =			Application =	
		Priority •	Project =	Status =	Request Date •	Due by •	Assigned To =	
Vie	w Edit	10530	Helpdesk	New chair for the off	ice manager		Microsoft Outlook	
His	st Qedit	P 2	Helpdesk Data	Open	07/13/2007		Chris Robinson	
🗹 🚺	w Edit	10527	Helpdesk	Authorization to prov	ide new furniture for new employ	ee - Frank Bell		
His	st Qedit	P 3	Helpdesk Data	Open	04/19/2007		Jimmy Duncan	
🖌 Vie	w Edit	10518	Helpdesk	Authorization to prov	ide new furniture for new employ	ee - Gloria Menendez		
His	st Qedit	P 3	Helpdesk Data	Open	04/13/2007		Jimmy Duncan	
- Vio	w Edit	10517	Helpdesk	Authorization to prov	ide a new telephone extension fo	or new employee - Gloria Menen	dez	
His	st Qedit	P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
) Vie	w Edit	10516	Helpdesk	Authorization to prov	ide a new computer for new emp	loyee - Gloria Menendez		
His	st Qedit	P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
	records							

Quicklist record selector

Exporting Results

Clicking the **Export Results** button pops up a selection lists as shown in this screenshot:

Refresh Turn	On Record Selector	Group Issues	Update Issues	Return Expor	t Results Print Page		ExtraView Quicklist F	Report
Records 1 to 7 of	f7				Microsoft Excel (Pla	in output)		
Status = Open A	AND Assigned To	= Bill Smith			Microsoft Word			
Prepared by Bill					Microsoft Excel (Fo	rmatted output)		
					Adobe PDF			
	100.11				Text			
	ID # 🔻	Area =	Title =	L			Days Open	-
	Priority =	Customer =	Status =	Produ	ct =	Module	Assigned T	o =
View Edit	10557	Buos	There is a def	ect in the admin	module when a user	makes an error	755	~

Simply click on the output format you would like to save the results within, and a local file will be created on your computer.

Quickedit

Many Quicklist reports will have a Quickedit button. This allows you to update any of the fields on the report, without entering the *Edit* screen. You may enter Quickedit for as many items as you like.

		Priority =	Customer =	Status =	Product =	Module =	Assigned To
View	Edit	10540	Test Cases	This is a test case for the ler	igth of the screen		553
Hist	Qedit			Not Yet Tested	Tracker	CLI	
		ID #	Area	Title			Days Open
		10539	Bugs	This is a fault with the Proc	essor module		559
	Update	Priority	Customer	Status	Product	Module	Assigned To
Hist	Cancel	P3 💙	Corona	Not Yet Tested	Tracker Enterprise	Processor 🗸	Bill Smith
View	Edit	10538	Test Cases	Test #1 for the CLI			559
Hist	Qedit			Tested - Failed	Tracker	CLI	
View	Edit	10537	Test Cases	Check the database connect	ion works correctly		1443
Hist	Qedit			Tested - Failed	Tracker	CLI	
/iew	Edit	10536	Test Cases	Check how many commands	are in the stack	and a star of a star star star	1447

Quickedit mode

When you press the **Update** button within a Quickedit session, all rules and validations are performed, exactly as if you were in the *Edit* screen. Therefore, if a field becomes required as part of your update, and the field is not on the Quicklist layout, then a window pops open and asks you to enter a value for the missing field.

Hover Text Popups

Your Quicklist reports may have been configured with hover text. This is the content of specific fields that your administrator allows you to see when you hover your mouse over the **View** button, without clicking the button. This is often a shortcut to viewing the entire issue. A popup appears, with the contents of the fields that were configured. A typical hover text popup looks like this:

ispia	ying record	ls 21 to 40 of 1	58 💌				
red b	oy Bill Sm	ith on Octobe	er 13, 2015 11:08:52 AM	PDT			
ess A	Area equa	als Bugs					
		ID#▼	Business Area =	Title =			Days Open =
		Priority •	Customer Name	Status =	Product =	Module =	Assigned To
'iew	Edit	10621	Bugs	Software issue repo	orted by Customer		1259
Hist	Qedit	P 4		New	Tracker Enterprise	GUI	太郎日本
/iew	Edit	10620	Bugs	Software issue repo	orted by Customer		799
Hist	Details				x	API	Bill Smith
'iew							1263
list	Descri	ID # 10620	duction steps:			GUI	Mary Brown
'iew	Descri		n with valid UserId and F	Password	pr		2369
Hist		2. Click	k on [Workspace] from m	ienu		Processor	Sally Hunt
'iew		3. Ente	er multiple valid id (Ex: 10	0676:10677) in search	for ID# and click on <enter> from keyboard</enter>		2616
Hist					'6;10677' screen is displayed	Database	Bill Smith
'iew		Expect	ed Result:		re		2617
list			error should not be obse	rved		CLI	Jimmy Duncan
/iew		Actual	Result:				2617
list			error is observed			CLI	George Miller
iew		Disease	view attached screen fo				2617
list	- qeuit -	Please	view attached screen to	r more mormation		CLI	George Miller
'iew	Edit	10548	Bugs	Test customer issue	e		2617
list	Qedit	P 3	Cisco	New	Tracker	Processor	Mary Brown
'iew	Edit	10546	Bugs	This is a test case f	for the length of the screen - Test Case Failure		1757
Hist	Qedit	P 4		Closed	Tracker	GUI	Mary Brown

Detailed Reports

Detailed Reports produce more details than the Quicklist, and are configured by your administrator. Typically, this report will give you access to view most fields within a issue. Selecting **Run Detailed Report** and pressing the **Go** button will generate a report using the filters selected on the screen in the Query Filter section. Like Quicklist Reports, Detailed Reports typically also give you the ability to click into edit mode to edit the issue, assuming you have permission. They may also have other buttons to access issue history, or to delete the issue.

Edit 10373 Notifications are not sent upon submission. Bugs Date of Last Status Date Created Last Modified Days in Status Days Open A/10/07 3:48 PM 10/4/05 8:21 PM 4/10/07 3:48 PM 1628 2180 Originator Last Changed Assigned To Product Module Bill Smith Bill Smith Jimmy Duncan Tracker Enterprise GUI Category Status Priority Severity Platform Software Fixed P 2 Manufacturing Linux Defect Release Found Needs Doc Resolution Privacy Screenshor No Implemented Private History Invactor Platform I/10/4/05 8:21 PM T/16/06 10:47 PM Fixed Platform Platform I/10/4/05 8:21 PM Topplicate Fixed Platform Platform I/10/4/05 8:21 PM Topplicate Fixed Platform Platform I/10/4/05 8:21 PM Duplicate Fixed Platform Platform Description Notification emails are not sent to CC rec		ID #	Title		A
Submission. Submission. Date of Last Status Date Created Last Modified Days in Status Days Open All 1007 3:48 PM 10/4/05 8:21 PM 4/10/07 3:48 PM 1628 2180 Originator Last Changed Assigned To Product Module Bill Smith Bill Smith Jimmy Duncan Tracker Enterprise GUI Category Status Priority Severity Platform Software Fixed P 2 Manufacturing Linux Defect Release Found Needs Doc Resolution Privacy Screensho No Implemented Privacy Screensho 10/4/05 8:21 PM T/16/06 10:47 PM Fixed PI 10/4/05 8:21 PM Duplicate Fixed PI 10/4/07 3:48 PM Bill Smith Bill Smith		12 11			Area
Change 10/4/05 8:21 PM 4/10/07 3:48 PM 1628 2180 Originator Last Changed Assigned To Product Module Bill Smith Bill Smith Jimmy Duncan Tracker Enterprise GUI Category Status Priority Severity Platform Software Fixed P 2 Manufacturing Defect Linux Release Found Needs Doc Change Resolution Privacy Screensho No Implemented Private Private History Invariant Duplicate 12/12/06 11:37 AM Hours of the submit bill Smith Oficiation emails are not sent to CC recipients upon selection of the Submit button. Cosed Duplicate Fixed 10/107 3:48 PM Bill Smith Bill Smith Bill Smith Bill Smith Bill Smith Description Notification emails are not sent to CC recipients upon selection of the Submit button. Comments 4/10/07 3:48 PM Bill Smith This comment will be added to all the related issues 2/12/206 10:13 AM Bill Smith Bill Smith Duane Test Discontaol Screenshot DSC01306.JPG 1,640,118 Bill Smith Bill Smith	Edit	10373			Bugs
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Category Status Priority Severity Platform Software Fixed P 2 Manufacturing Defect Linux Release Found Needs Doc Change Resolution Privacy Screenshot No Implemented Private Fixed Platform History Fixed Private Fixed Platform 10/4/05 8:21 PM Bill Smith T/16/06 10:47 PM Bill Smith Fixed H H 12/22/06 10:13 AM Bill Smith Duplicate 12/22/06 10:16 AM Bill Smith Fixed H/10/07 3:48 PM Bill Smith H H Open Fixed 12/12/06 10:13 AM Bill Smith Description Notification emails are not sent to CC recipients upon selection of the Submit button. Comments 410/07 3:48 PM Bill Smith This comment will be added to all the related issues 12/22/06 10:13 AM Bill Smith This comment will be added to all the related issues View View Screenshot Sc01306.JPG 1,640,118 Bill Smith 10/4/05 8:22 PM Bill Smith 10/4/05 8:22 PM Manually Added Related Issues Related Test Cases	Originator	-	Assigned To	Product	Module
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Defect Defect Release Found Needs Doc Change Resolution Privacy Screenshot No Implemented Private Private History Implemented Private Private 10/4/05 8:21 PM + 7/16/06 10:47 PM + 12/18/06 11:37 AM + 12/22/06 10:13 AM + 12/22/06 10:16 AM + 12/18/06 11:37 AM + + 12/22/06 10:13 AM + 12/22/06 10:16 AM + 4/10/07 3:48 PM + + Description Notification emails are not sent to CC recipients upon selection of the Submit button. Comments 4/10/07 3:48 PM Bill Smith This comment will be added to all the related issues +	Category	Status	Priority	Severity	Platform
No Implemented Private History Fixed Private I/10/4/05 8:21 PM T/16/06 10:47 PM Fixed Private I/10/4/05 8:21 PM T/16/06 10:47 PM Fixed Private I/10/4/05 8:21 PM T/16/06 10:47 PM Fixed Private I/10/4/05 8:21 PM Open Fixed Private I/10/4/05 8:21 PM Open Fixed Private I/10/20 5 0:13 AM Duplicate Fixed Private Description Bill Smith Bill Smith Bill Smith Bill Smith Description Comments Private Private Private I/10/07 3:48 PM Bill Smith Bill Smith Bill Smith Private Private I/10/07 3:48 PM Bill Smith Duplicate File Size Created By User I/10/07 3:48 PM Bill Smith Duplicate File Name File Size Created By User I/10/105 8:22 PM Notification DSC01306.JPG 1,640,118 Bill Smith Bill Smith Di/4/05 8:22 PM I/10/4/05 8:22 PM Notification DSC01306.JPG 1,640,118	Software	Fixed	P 2	-	Linux
History New 10/4/05 8:21 PM Bill Smith Closed 12/22/06 10:13 AM Bill Smith Closed 12/22/06 10:13 AM Bill Smith Duplicate 12/22/06 10:13 AM Bill Smith Bill Smith Description Notification emails are not sent to CC recipients upon selection of the Submit button. Comments 4/10/07 3:48 PM Bill Smith This comment will be added to all the related issues 12/22/06 10:13 AM Bill Smith This comment will be added to all the related issues 12/22/06 10:13 AM Bill Smith Duane Test Attachments Created By Notification Screenshot Notification Screenshot Manually Added Related Issues Related Test Cases	Release Found		Resolution	Privacy	Screenshot
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Screenshot 10/4/05 8:22 PM Manually Added Related Issues Related Test Cases	Thumbnail	File Description	File Name File Size C	Created By Use	r
Related Test Cases					
	Manually Added Rela	ted Issues			
Related Customer Issues	Related Test Cases				
	Related Customer Iss	sues			

Sample Detailed Report

Other options on the menubar of the Detailed Report are identical to those of the Quicklist Report. Click <u>here</u> for details of these options.

Output & Query Options

Report Destination

This select box allows you to control the destination of the report. The choices are:

- Output to saved format this outputs the report to the format saved with the report. Note that for Quicklist and Detailed reports, this is always Browser output
- Output to Browser
- Output to Microsoft Excel spreadsheet (plain output)
- Output to Microsoft Excel spreadsheet (formatted output)
- Output to Microsoft Word document
- Output to Adobe PDF document
- Output to text file

Note that some reports (such as charts) can only be output to the browser window or to a PDF document. Calendar reports and planning reports can only be output to the browser window. Note that when you output reports to Microsoft Excel, there is an option to output the plain, raw data with no formatting or to output the data with formatting. The formatted output will only work with the 2003 version of Microsoft Excel or later. There is no support for formatted output with earlier versions. When you are outputting the plain data, no totals or statistics are generated. This allows you to create your own totals and formulae, as you need, within Excel. If your data in ExtraView contains double-byte characters (this normally means Asian languages) then you should set your Microsoft Office character set to **windows-1250** within your personal options.

Also note that you cannot output some field display types to Excel, as there is no mechanism within Excel that would allow you to view these fields. For example, you cannot output attachments, HTML Area fields, document fields, and image fields to Excel.

Records per Page

You can choose to output a different number of records for the report on each page. These numbers have been defined by the system administrator, but by default are *20, 100, 500* and *unlimited*. If you are outputting the results to a browser, then you are able to page back and forward between pages of the report. If you are outputting to any other device, the report will display the number of records selected in this field. Note that ExtraView remembers the last entry in this field and will use the value for successive reports until you change it once again, except for an unlimited numbers of records. ExtraView does not remember this selection. Also, please note that your Administrator may have disabled the option to retrieve an unlimited number of records.

Note that the control of Records per Page only applies to reports directed to the browser, not to reports sent to Microsoft Excel, Microsoft Word or text. This is deliberate, as in use, it is typical to want all the records for a report exported at one time.

Query Options

• Condensed / Expanded Query Filters – When you are in Condensed mode each query filter on the

screen allows a single selection. When you are in Expanded mode, each filter that has a display type of list or tab allows multiple selections. Note that you will only see these options if your administrator has granted you permission. This is discussed in detail below.

- Standard / Advanced Query Screen When you are in Standard query mode, you see a range of query filters (either in Expanded or Condensed mode), as set up by your administrator. You select filters for the report by choosing from the various selection lists or entering text or numeric information. When you are in Advanced query mode, you create query filters one at a time. Standard query mode is quick and simple to use for straightforward searches, but Advanced mode allows more complex query filters to be built before running your report. Note that you will only see these options if your administrator has granted you permission.
- Clear Filters Pressing this button clears all the query filters on the screen back to their initial state

Keyword Searching

Keyword searching allows you to perform searches on text data fields, documents and file attachments stored in your ExtraView database. There are two searching technologies used within ExtraView:

- The standard keyword search mechanism uses direct queries on the database to obtain results. The advantage is that there is no special setup needed by the administrator of your system. The disadvantage is that queries are relatively slow, especially on large databases.
- The Quickfind mechansim requires a small amount of setup by the administrator, but once set up is extremely fast to return results from your queries. It also has special properties in better use of wildcards, phrase search, and in the support of Boolean logic within your searches. This feature may not be turned on within your installation. If you are not sure, please ask your administrator as there is no way to tell from the user interface if Quickfind is enabled.

All searching for keywords is case-insensitive.

Using Keyword Search

There is an option to be able to search attached documents, as well as searching for keywords within the text of the issues in your database. If file attachment searching is enabled, the search box will look like:



Check the box to allow ExtraView to search the attachments in its database. Note that if you have a large number of attachments and / or the attachments are of a large size, and Quickfind is not enabled, the search is likely to take longer to finish. Also, note that the administrator may have restricted the file types through which you can search for keywords. For example, you will probably be allowed to search through Microsoft Word documents, but not through image files. In the same way, the administrator may have placed a limit on the total size of the attachments that can be searched, without warning the user. When you elect to search attachments for the keywords, then the issue is returned when the keyword is found either in the attachment or within the text in the issue.

Note: You cannot save a report that performs a keyword search with the option to search attachments. This

is intended as a feature to be used on an ad hoc basis as opposed to being used for routine reporting.

Standard Search Mechanism

For efficiency, searching attachments works slightly differently if your underlying ExtraView database is Oracle or Microsoft SQL Server. The searching with an Oracle database is case sensitive, and the searching with Microsoft SQL Server is case insensitive. Your system administrator can tell you which database is being used, if you are not certain. This basic search mechanism has the following features:

- To search for a single word, in any of the text type fields within issues, simply enter the word within the keyword search field. For example, if you enter the word **picture**, then ExtraView will search for this word anywhere within the text of an issue. Finding a keyword within a field means that the search will look for all words that start with the text you enter. For example, if you enter the keyword **table**, then issues containing both **table** and **tabletop** will be found
- To search for multiple keywords enter them, separated by spaces. All the keywords entered must exist within the same field within an issue. For example, if you enter the words **picture frame** then ExtraView will search for the occurrence of both words within the same field within an issue. The same general rule about special characters as in searching for single keywords applies
- If you have four or more search words, then words that are a single character are dropped. If there are four or more words and all are only single characters, then only the first one is used. Also, if duplicate words are found in the search, then only one is used
- You may use an asterisk as a wild card character in your query. This will match any number of characters in the result you are looking for. You may also use a question mark, in which case only a single character is used as the wild card. For example, if you have a field in the data with the characters **abcdefg** this will be found with the wild card **ab*fg** but will not be found by **ab?fg**. However, **abcdefg** will be found by both **abc*efg** and by **abc?efg**.

Quickfind Search

ExtraView's Quickfind technology allows especially fast searching for text within your installation when seeking keywords that may be spread through thousands of issues or file attachments. Quickfind's efficiency and speed comes from techniques that index the text and the file attachments you enter into your database. In addition to searching for text, the Quickfind technology may also be used to search for issue ID's, email addresses and URLs within issues. All searches executed using Quickfind are case-insensitive.

Searching for Single Words

To search for a single word, in any of the text type fields within issues, simply enter the word within the keyword search field. For example, if you enter the word **picture**, then ExtraView will search for this word anywhere within the text of an issue. Finding a keyword within a field means that the search will look for all words that start with the text you enter. For example, if you enter the keyword **table**, then issues containing both **table** and **tabletop** will be found. Keywords that you search for should not contain special characters (see below), with the exception of email addresses within fields, and with the exception of valid URLs.

Searching for Multiple Keywords

Enter the keywords, separated by spaces. All the keywords entered must exist within the same text type field within an issue. For example, if you enter the words **picture frame** then ExtraView will search for the occurrence of both words within the same field within an issue. The same general rule about special characters as in searching for single keywords applies.

Wildcard Searches

Within each specified keyword there may be either or both of the wildcard characters, * or ?. This produces a wildcard search. At each position where a * exists, there may be zero or more characters in the string in the field for a match to occur. For example, **abc*def** matches a field value of **abcdef** or **abcxyzdef**. At each position where a ? exists, there must be a single character in the string in the field for a match to occur. For example, **abc*def** matches a field value of **abcdef**. Wildcards at the beginning of a keyword will invoke a lengthy search of all words within the database and should be avoided if possible. Wildcards may appear once or multiple times in a keyword, and they may appear in any or all of the keywords in a multiple keyword search.

Phrase Searches

A phrase search is used when a keyword is in either of three formats:

- 1. The keyword is surrounded by single or double quotes
- 2. The keyword contains special characters
- 3. The keyword contains token breaks

A phrase search of type 1 produces a hit when the exact keyword phrase inside the quotes is found in the field values. Basically, this means that the keywords in the phrase appear in the specified order and are separated only by special characters or spaces. For example, a phrase of "**abc def**" will match with a field value of **abc def** or **abc-def** or **abc - def**. Note that - is a special character. A phrase search of type 2 is converted to a phrase search of type 1 by replacing the special characters with spaces and surrounding the result with double quotes. Essentially, the special characters are replaced with token separators and the resultant phrase is used in the phrase search. A phrase search of type 3 is converted to a phrase search of type 1 by replacing all word breaks with a space character and surrounding the result with double quotes, if it is not already surrounded by double quotes. As an example, a string like **Fred** \pm \pm \pm , which consists of five words (Alphanumeric and Hiragana). Another example is **Fred** \pm \pm , which gets broken into **Fred** \pm \pm \pm , which consists of two words (Alphanumeric and Katakana). As another example, **abc-def** will produce a phrase search of "**abc def**". This would match a field value of **abc def** or **abc-def** or **abc - def**, but not **abcdef**. Terms in a phrase search may use the * and ? wildcards. However, they are not permitted to appear at the beginning of any term used in a phrase search.

Searching within Repeating Row Data

When using the **contains** operator on a keyword search, in conjunction with other query filters that only return a subset of repeating rows in the results, you can use the **Filter Repeating Row Values** checkbox to restrict the results returned to only those rows that appear in the records returned from the repeating rows that match the query filters on those rows.

Special Characters

This refers to installations with Quickfind enabled only. The Quickfind special characters are:

+ - & | ! () { } [] < > ^ " ~ * ? : \setminus

Note that * and ? are wildcard characters. Special characters are ones that Quickfind does not index and you cannot query for these characters, either as characters by themselves or when the character is part of a word, i.e. there is no space between the special character and an adjoining alphanumeric character.

When a text field which contains special characters is indexed, the special characters are removed and are treated as a space. For example if you enter **(abc)def** then this is indexed as the two separate words **abc** followed by **def**.

Complex Queries

You can use Boolean operators within your keyword, to perform complex queries. To accomplish this, you use the following operators with the **AND**, +, **OR**, **NOT** and -. To indicate to Quickfind that you are entering a complex query, preface the query with the # character and ensure that the **AND**, **OR** and **NOT** are in upper case.

• AND

The **AND** operator matches issues where both terms exist anywhere in the text of a single field within the issue. This is equivalent to an intersection using sets. The symbol **&&** can be used in place of the word **AND**. To search for documents that contain **abc def** and **def ghi** use the query:

```
#abc def AND def ghi
```

+

The + or required operator requires that the term after the + symbol must exist somewhere in a the field of a single issue. To search for documents that must contain **abc** and may contain **def** use the query:

#+abc def

OR

The **OR** operator matches documents where both terms exist anywhere in the text of a single field within the issue. The symbol || can be used in place of the word **OR**. To search for documents that contain **abc def** or **def ghi** use the query:

#abc def OR def ghi

NOT

The **NOT** operator excludes issues that contain the term after **NOT**. This is equivalent to a difference using sets. The symbol ! can be used in place of the word **NOT**. To search for issues that contain **abc def** but not **def ghi** use the query:

#abc def NOT def ghi

Note: The **NOT** operator cannot be used with just one term. For example, the following search will return no results:

#NOT abc def

The - or prohibit operator excludes issues that contain the term after the - symbol. To search for issues that contain **abc def** but not **def ghi** use the query:

#abc def - def ghi

Searching Within Specific Fields

You can restrict which Extraview fields to search. You must know the ExtraView field name to perform this searching. To achieve this, you first enter the field name, then a : character, and then the term you are searching for. You can combine the specific field search with other complex search criteria. For example, you might want to search only the **SHORT_DESCR** field for the term **abc**. The syntax for this is:

#SHORT_DESCR:abc

Note that if you want to search for multiple words within a field, you need to repeat the field name. For example, to search the **SHORT DESCR** field for the terms **abc** and **def** you would enter:

#SHORT_DESCR:abc AND SHORT_DESCR:def

Grouping Queries

Quickfind supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query. For example, to search for either **abc** or **def** and **ghi** use the query:

#(abc OR def) AND ghi

This eliminates any confusion and makes sure that ghi must exist and either term abc or def may exist.

Escaping Special Characters

Quickfind supports escaping special characters that are part of the query syntax. The list of special characters is:

+ - & | ! () { } [] ^ " ~ * ? : \

To escape these character use the $\$ before the character. For example to search for (1+1):2 use the query:

#(1+1)):2

Fuzzy Searches

Quickfind supports fuzzy searches based on the Levenshtein Distance, or Edit Distance algorithm. To do a fuzzy search use the tilde ~ symbol at the end of a single word term. For example to search for a term similar in spelling to **roam** use the fuzzy search:

#roam~

This search will find terms like foam and roams. Note the use of the # at the beginning of the search term. An additional, optional parameter can specify the required similarity. The value entered is between 0 and 1, with a value closer to 1 only terms with a higher similarity will be matched. For example:

#roam~0.8

The default that is used if the parameter is not given is 0.5.

Proximity Searches

Quickfind supports finding words are a within a specific distance away. To do a proximity search use the tilde ~ symbol at the end of a phrase. For example to search for **abc** and **def** within 10 words of each other in a document use the search:

#abc def~10

Expanded Queries

The Expanded Query capability within ExtraView allows you to select multiple values from the available lists for a single search. For example, the Expanded Query would be helpful if you would like to run a report on *Open* and *Unassigned* issues that were originated by Bill Engineer or Sue Engineer. With the standard search screen, you can only search for one of the Statuses and one of the Originators. Your administrator may not have given you permission to use this feature.

- Note that when you select multiple values from a list, the search query uses the "*or*" operator between the different values.
- Additionally, the expanded query option allows you to choose None as an option in select lists.
- You can select any combination of filters with different fields.
- Expanded queries are available from the Search/Report screen and from the screens that create custom reports, summary reports and charts.

Allowed Values and Expanded Queries

Similar to Advanced Queries, allowed values do not operate within filters selected for expanded queries. You will see all parent and all child values in the filter lists for expanded queries.

Using Expanded Queries

Category	*None *	1
	Any	- D
	Documentation	
	Software	, de
-	Hardware	1

Expanded Query field

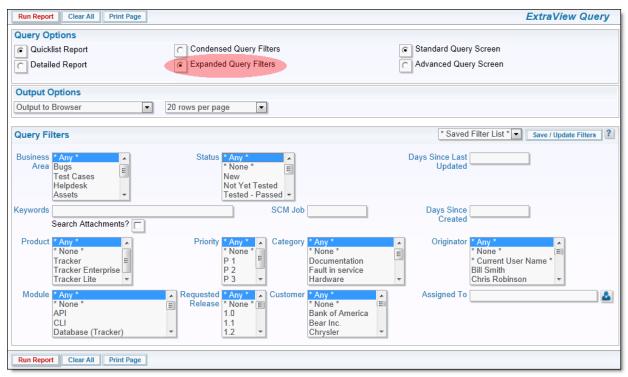
• Proceed to select your report parameters. If you are using a Windows operating system, you can

select multiple values by pressing the control key and clicking the mouse button on each of the multiple values. If you are using a Unix operating system, simply click on each of the multiple values the same way you would click single values. If you are using a Macintosh, use the Apple command key.

• The above example is analogous to selecting the following filters, if you were using the advanced search mode, with condensed filters:

Category equals Documentation or Category equals Software

- After you have made all of your selections, use one of the standard reporting tools to view your results.
- With multi-valued select fields, there are two buttons which allow you to expand and to shrink the display size of the lists. This aids in selecting multiple value on long lists.



Expanded Query screen

Reporting

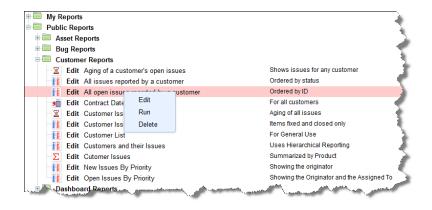
The ExtraView reporting feature offers the user a variety of different ways to report on, analyze and summarize the data within the database. After clicking the **Report** button on the navigation bar, users have the option of creating and running one of several report types; Column Report, Summary Report, Matrix Report, Dashboard Report, Charts and more. Reports can be created and saved for future use. If the administrator has granted you permission, the reports you create and save can be made available to all users; else the reports can be saved for your own personal use.

Print Page					ExtraView Report
reate New	Report				
Net Net	v column report	🔚 New plann	ing report	🔡 New contair	er for existing reports
Σ Net	v summary report	🔀 New chart		New layout	for existing reports
_	v matrix report	New taskb	oard report	·	•
	v aging report	T New dash			
9 INE	v calendar report	INEW CUSTO	m URL report		
Output Opti	ons				
Output	to saved format	20 rows per page	-		
Saved Repo	rts 🙀	Manag	e User Groups Mar	nage Scheduled Reports	Manage Report Folders
	Title		Δ	Description	
Search *			* Search *		
P∰ E P∰ E Z E	dit Aging of a customer's open dit All issues reported by a cus dit All open issues reported by dit Contract Date Renewals dit Customer Issues dit Customer Issues - Time Sp	stomer a customer	Ordered by st Ordered by ID For all custon Aging of all is Items fixed ar) ners sues nd closed only	
	dit Customer List dit Customers and their Issues		For General Uses Hierard	use hical Reporting	
	dit Customers and their issues		Summarized		
	dit New Issues By Priority		Showing the o		
	dit Open Issues By Priority		-	Originator and the Assigned To	
	board Reports				
🗉 🔲 Feat	ure Request Reports				
🗉 🗐 Gen	eral Reports				
🗄 🧮 Help	desk Reports				
-	uladas Dass Dassets				
🗉 🔲 Knor	wledge Base Reports				
⊕ 🔲 Knor ⊕ 🔲 SLA	Meage Base Reports Reports Case Management Reports				

Sample Report screen

Reports can be manipulated on the report screen in a variety of ways:

- **Drag-and-Drop** You may drag a report from one folder to another report folder, assuming you have permission to write to the destination folder. You may also drag a complete folder to another location
- **Double-Click on the Report Icon** When you double-click on the report icon, you can alter the name or title of a report, without the need to enter the report editor
- **Right-click on Report Name or Title** When you right-click on a report, you see a popup menu that allows you to Edit, Run or Delete the report



Creating New Reports

To create a new report, you have the following report options:

- New Column Report Select the columns you want to display and which filters to set. For more information regarding Column Reports, please see <u>here</u>
- New Summary Report This allows you to design a report which will summarize on up to 10 fields, providing a total at each level. There is an option to provide additional statistics for each report level For more information regarding Summary Reports, please see <u>here</u>
- New Matrix Report You can select two fields as axes for the report, and see a count of all the issues at each coordinate For more information regarding Matrix Reports, please see <u>here</u>
- New Aging Report This provides a report that shows the time issues have spent within different statuses For more information regarding Aging Reports, please see <u>here</u>
- New Calendar Report These allow you to represent issues upon a calendar, with a date within each issue being used For more information regarding Calendar Reports, please see <u>here</u>
- New Planning Report Planning reports work with parent and child related issues. The child issues use a start and an end date on a calendar, and can be dragged to alter the dates. Visually, you are looking at many child issues on the report, and can therefore move the start and end dates of any issues to plan many interacting tasks For more information regarding Planning Reports, please see <u>here</u>
- New Chart Charts provide the ability to create pie, line, bar, and area charts For more information regarding Charts, please see <u>here</u>
- New Taskboard Report Ths report type allows issues to be represented as tiles on a background. The tiles represent tasks and can be dragged to new positions on the background. In this way, you can easily manipulate any number of issues to better organize work schedules and manage tasks For more information regarding Taskboard Reports, please see <u>here</u>
- New Dashboard Report Dashboard reports allow you to organize many reports into a single report. Typically dashboards will be shared to show key metrics that drive your organization For more information regarding Dashboard Reports, please see <u>here</u>
- New Custom URL Report These give access to run custom reports, and to place the contents of a URL external to ExtraView within your workspace or ExtraView screen For more information regarding Custom URL Reports, please see <u>here</u>
- New Container Report Container reports allow you place a number of reports together within a single PDF document that can be shared For more information regarding Container Reports, please see <u>here</u>
- New Layout Layouts can be used to summarize information and place the results within Container reports For more information regarding Layouts, please see <u>here</u>

Common Report Functions

Saving Reports

Reports can all be saved so that they may be run at any time in the future.

Assuming you have been granted permission by your administrator, there are 3 potential areas into which you can save a report:

- The My Reports area, where only you have access to the reports that are saved
- The **Public Reports** area, where reports created for everyone's use are saved. You may or may not have access to edit these reports. Reports which have been saved so that only individual users, specific user groups and / or user roles are also displayed here, in addition to Public Reports
- The **Shared Reports** area. This Shared Reports area is provided for backwards compatibility. When you edit and save a report which is in this group, it will be moved to the Public Reports section. The sharing of reports has been improved with version 11 and there is no longer a need for a separate Shared Reports section. Previously, the Shared Reports section is where reports were placed that you wanted to share with a user group.

If a report already exists when you click the **Save** button, you are prompted to overwrite the existing report. If you click the **Save As** button, you will be saving the report with a new name and/or description.

• Reports have a title, up to 100 characters in length. This is required.

There is a button to the right of the **Report Title** that appears when you are editing an existing report. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful when managing public reports

- Reports have a description, up to 100 characters in length. This is required
- When you click on **Save** or **Save As**, you will see the following dialog box, asking you to confirm the Report Title and Description, and giving you the opportunity to save the report for personal use within the **My Reports** folder, or for public use, within the **Public Reports** folder.

In both cases, you can place the report into an existing report folder by selecting the folder name within the **Existing Folders** selection list, or you can create a new folder by providing its name in the appropriate field.

If you save the report for public use, you can make the report available to all users who have permission to see and run public reports. You may also share public reports to a much more limited audience. You achieve this with entries on the **Select Optional Visibility and Report Editor Privileges** are of the dialog. You may share the report with individual users, members of a **User Group** or with all members of a **User Role**. Note that **User Groups** are created and maintained on the **Report** screen. Further, when you share a report in this manner, you may allow the users with whom the report is shared to only run the report, or to be able to run and to edit the report.

Note that the administrator may not have given you privileges to store public reports or reports for different user roles. The administrator may also have used a setting that ensures that you have a minimum number of filters to be used for any report. On large databases, this is a way in which it is ensured that a single report does not attempt to download a huge number of issues, consuming significant resource on the server.

Note: When you use the **Optional Visibility and Report Editor Privileges**, you should be careful to retain permissions for yourself. If you simply allow another user to see and edit a report, you will no longer have access to the report yourself. It is recommended that you add yourself as a user who can both see and edit reports.

Save Cancel Print Page		Save Report
Directions		
	eport within a Public folder, it will be visible to all users who h isibility and Report Editor Privileges options. You can creat ithin that folder.	
Report Title	List of Closed Issues	
Report Description	Ordered by Product	
Existing Folders		
	Folder with all reports that prepare PDF's asasas	
	Public Reports	
	Asset Reports Bug Reports	
	Customer Reports	
	Dashboard Reports Feature Request Reports	
	General Reports	
	Helpdesk Reports Knowledge Base Reports	
Create New Subfolder Within: 'My Reports'		
cross risk consists risks and reprint		

• Saving a report for personal use

we Cancel Print Page			Save	e Report
Directions				
nter the Report Title and the Description. If you save the r ports unless you override this using the Select Optional V xisting folder, then enter a new folder name to be created w	sibility and Report Editor Privile	e visible to all users wh ges options. You can cr	to have permission to run reate a new subfolder by o	/ edit public clicking on any
Report Title	List of Closed Issues			
Report Description	Ordered by Product			
Existing Folders	My Reports Folder with all reports that prepa asasas Public Reports Asset Reports Bug Reports	re PDF's		
	Customer Reports Dashboard Reports Feature Request Reports General Reports Helpdesk Reports Knowledge Base Reports		8	
Create New Subfolder Within: 'Bug Reports'				
elect Optional Visibility and Report Editor Priv	leges			
ny entries below will override the standard report permission ake the report only visible and / or editable by the selected	s. You may add individual users, u Isers / groups / roles.	ser groups or user role	s. Check the appropriate	boxes to
Click button to select and add users				
Select all users in a role * None *	~			
Click button to select and add user groups				
Role/Group/User Typ	e Rep	ort Visible 👔	Report Editor ?	
	E			

Saving a Public or shared report

• A user cannot save more than one report with the same title and description that is for personal use,

and a report cannot be saved for global use, if a report with this title and description already exists

• If you use the **Save As** option to create a copy of the report with a different name and/or title, any report schedule that has been created for the original report is not saved to the new report, to avoid having the same report output scheduled twice. A schedule can be set up for the newly created report in the normal way.

Sharing Reports

Provided the administator has enabled this feature, reports may be shared between arbitrary groups of users. This is contrasted with public reports which all users can see, and reports saved for user roles, which all members of a user role can see.

Setting up user groups

Print Page ExtraView Report **Create New Report** New custom URL report New column report 9 New calendar report Σ New summary report New planning report New container for existing reports New matrix report 🔀 New chart New layout for existing reports New aging report New dashboard report **Output Options** Output to saved format ▼ 100 rows per page • Saved Reports Manage User G Manage Scheduled Reports Manage Report Folders • Solution States St Dublic Reports **Edit** Feature Requests - Open Requests By Product and Category Bernet \sim

User groups are set up from the Report screen as shown here:

Managing user groups from the Report screen

When a user clicks the button, they are given a screen where they will see all the user groups they have set up, and where they can create new user groups, and where they can administer exactly which users belong to each of their groups. The user who creates a group is termed the **owner** of the user group.

ancel Print Pa	age			IVI	anage User Groups
Directions This utility allow used for purpose	s you to create and maintain gr as such as sharing reports.	roups of users. Groups of users ar	e arbitrary collections of peop	ole that are primarily	
Create a	new user group				
	Group Name	Group Title	Owner	Created	Last updated
Edit De	DELTA_PROJECT	Delta Project Group	Bill Smith 10/4/11 3:18 PM	Bill Smith 10/4/11 3:18 PM	Bill Smith 10/4/11 3:18 PM
Edit De	MGMT	Management Group	Bill Smith 10/4/11 3:18 PM	Bill Smith 10/4/11 3:18 PM	Bill Smith 10/4/11 3:18 PM
ncel Print Pa	age			2 record(s) sele	cted from a total of 2 record(s)

The user group popup

From the above screen, the user can either create a new user group, alter the members of an existing user group, or delete an unneeded user group.

r group name DELTA_PROJECT ser group title Delta Project Group to select user(s) to add to group Company User ID User Name Company pup Owner BSMITH Bill Smith Superior Software Corp el QA Mary Brown Superior Software Corp el MARY Mary Dickens Superior Software Corp el GREG Greg Goldberg Superior Software Corp el TEST Susan Green Superior Software Corp	er group title Delta Project Group to select user(s) to add to group Company De Owner BSMITH Bill Smith Superior Software Corp QA Mary Brown Superior Software Corp MARY Mary Dickens Superior Software Corp GREG Greg Goldberg Superior Software Corp GRES Greg Goldberg Superior Software Corp SHUNT Sally Hunt Superior Software Corp			r		
Select user(s) to add to group and to grou	to select user(s) to add to group User ID User Name Company p Owner BSMITH Bill Smith Superior Software Corp QA Mary Brown Superior Software Corp MARY Mary Dickens Superior Software Corp GREG Greg Goldberg Superior Software Corp L TEST Susan Green Superior Software Corp SHUNT Sally Hunt Superior Software Corp					
User IDUser NameCompanyup OwnerBSMITHBill SmithSuperior Software Corpup OwnerQAMary BrownSuperior Software Corpup OwnerMARYMary DickensSuperior Software Corpup OwnerGREGGreg GoldbergSuperior Software Corpup OwnerTESTSusan GreenSuperior Software Corp	User IDUser NameCompanyIP OwnerBSMITHBill SmithSuperior Software CorpIAAary BrownSuperior Software CorpIAMary DickensSuperior Software CorpIAGREGGreg GoldbergSuperior Software CorpIAFESTSusan GreenSuperior Software CorpIASHUNTSally HuntSuperior Software Corp	er group title	Bond Project Gros	<u>ab</u>		
User IDUser NameCompanybup OwnerBSMITHBill SmithSuperior Software CorpelQAMary BrownSuperior Software CorpelMARYMary DickensSuperior Software CorpelGREGGreg GoldbergSuperior Software CorpelTESTSusan GreenSuperior Software Corp	User IDUser NameCompanyIP OwnerBSMITHBill SmithSuperior Software CorpIAAary BrownSuperior Software CorpIAMary DickensSuperior Software CorpIAGREGGreg GoldbergSuperior Software CorpIAFESTSusan GreenSuperior Software CorpIASHUNTSally HuntSuperior Software Corp					
el QA Mary Brown Superior Software Corp el MARY Mary Dickens Superior Software Corp el GREG Greg Goldberg Superior Software Corp el TEST Susan Green Superior Software Corp	QA Mary Brown Superior Software Corp MARY Mary Dickens Superior Software Corp GREG Greg Goldberg Superior Software Corp TEST Susan Green Superior Software Corp SHUNT Sally Hunt Superior Software Corp	to select us			Company	
el MARY Mary Dickens Superior Software Corp el GREG Greg Goldberg Superior Software Corp el TEST Susan Green Superior Software Corp	MARYMary DickensSuperior Software CorpGREGGreg GoldbergSuperior Software CorpTESTSusan GreenSuperior Software CorpSHUNTSally HuntSuperior Software Corp	up Owner	BSMITH	Bill Smith	Superior Software Corp	
el GREG Greg Goldberg Superior Software Corp el TEST Susan Green Superior Software Corp	GREG Greg Goldberg Superior Software Corp TEST Susan Green Superior Software Corp SHUNT Sally Hunt Superior Software Corp		QA	Mary Brown	Superior Software Corp	
el TEST Susan Green Superior Software Corp	TEST Susan Green Superior Software Corp SHUNT Sally Hunt Superior Software Corp	el	MARY	Mary Dickens	Superior Software Corp	
	SHUNT Sally Hunt Superior Software Corp	el	GREG	Greg Goldberg	Superior Software Corp	
		el	TEST	Susan Green	Superior Software Corp	
A SHUNT Sally Hunt Superior Software Corp	CSR Chris Robinson Superior Software Corp	el	SHUNT	Sally Hunt	Superior Software Corp	
el CSR Chris Robinson Superior Software Corp		el	CSR	Chris Robinson	Superior Software Corp	

Editing the members of a user group

The arrow in the above screen point to the button that is used to add users to the group.

Utilizing user groups

When you save a report, the popup window presents a list of all the information required to save and share your reports.

ave Cancel Print Page				Sav	e Report
Directions					
Enter the Report Title and the Description. If yo eports unless you override this using the Select existing folder, then enter a new folder name to b	Optional V	sibility and Report Edito			
1	Report Title	List of Closed Issues			
Report	Description	Ordered by Product			
Exist	ing Folders	My Reports Folder with all reports th asasas Public Reports Asset Reports Bug Reports	hat prepare PDF's	^	
		Customer Reports Dashboard Reports Feature Request Report General Reports Helpdesk Reports Knowledge Base Report		×	
Create New Subfolder Within: 'Bu	ug Reports'				
Select Optional Visibility and Report E	ditor Priv	ileges			
Any entries below will override the standard report make the report only visible and / or editable by the			l users, user groups or user re	oles. Check the appropriate	boxes to
Click button to select and add users	2				
Select all users in a role	* None *	~			
Click button to select and add user groups	2				
	Тур	e	Report Visible 👔	Report Editor 💽	
Role/Group/User					

Sharing a report with the members of a user group

A list of user groups are displayed when you elect to save a report as a personal report in the **My Reports** folder. If you choose a user group, then the report will be visible to all members of the user group.

Scheduling Reports

Reports can be set up to be generated automatically on a time schedule, and delivered to yourself and other users via email. The scheduler may also send reports directly to the Document Repository. Your administrator will have enabled the scheduling of reports for the entire system, and assuming you have been given permission, you will be able to schedule your own reports to be received by yourself and other users of the system.

You can send a report to the document repository at the same time you send it to users on the schedule or you can set up a schedule to perform just one of these functions.

Column reports, Summary reports, Matrix reports, Charts and Container reports may be scheduled and delivered via email. Note that other report types may not be scheduled - typically because they require interactivity with the user. Also note that fields with drilldown capability, such as the **Attahments**, **Document Fields** and **Image fields** are removed from the output of a scheduled report. Before you schedule a report, you must first save it. After saving, you may edit the report and you will see a button in the menubar with the label **Schedule Report**. When you click this button, you will see a screen similar to:

	×
Set Report Schedule Run Now Delete Cancel Print Page	Schedule a Report ?
Set schedule for report titled: All Issues Created in a Year	
SCHEDULE DOCUMENT REPOSITORY EMAIL OUTPUT ADVANCED DOCUMENT SECURITY	
Schedule Options	
Schedule Enabled	
Frequency R Weekly	
Start no sooner than I Monday	
Ridnight V	
Run as Owner 💽 🗹	
Select the Owner's Role 2 Administrator	
Output format P Browser	
Suppress recipient list 🔋 🗖	
Suppress column reports 2 with less than 0 results returned in the report	
Suppress report header & footer	

Setting the schedule for a report

Note that if you use the **Save As** option on a report, any schedule that was set up on the report is not copied to the new report. It is unlikely that the user would want to send the same report output on two identical schedules. The functions of the entries on this screen are as follows:

Entry	Purpose
Schedule Enabled	You may enable and disable the schedule for a report. If you disable the schedule, ExtraView suspends the sending of future reports on this schedule, but the schedule details are maintained.
Frequency	You may select one of Hourly, Daily, Weekly, Monthly on a day, Monthly on a date, Quarterly on a day, Quarterly on a date, Yearly on a day and Yearly on a date.
Start no sooner than	The selections here will change according to your choice of frequency. Note that the report may not be sent precisely on the time you select. If many users have scheduled reports at the same moment, then ExtraView queues these and sends them out one after the other. This avoids swamping the server and degrading the performance to all users while the reports are being prepared and sent. Note that the time selected is the time in the schedule owner's own time zone
Run as Owner	When Run as Owner is checked, the report will be run once as the owner and sent to all recipients, using the role selected in the next option. If this is not checked, the report is run as each recipient and sent to them individually. Note that only roles that the owner can select are available as choices.
Select the Owner's Role	By default the current role of the user creating the report is selected. However, there may be reasons to run the report as a different role, including the role of the owner at the time the report is run - this is the choice * Owner's Current Role *. For example an

	Administrator may want to set up a schedule, but send out the report using the permissions of the <i>Quality Assurance</i> role. If you are not running the report as the owner, then this select list does not appear
Output format	Scheduled reports are sent as attachments to the email that the recipient receives. You can choose to send the attachment as either a text file, a Microsoft Word file, a Microsoft Excel file, an HTML file or an Adobe PDF file. Note that the links to many functions that appear within the same report created within a browser are removed, as are images. This is because these links and images rely on the user being signed on to ExtraView when they are utilized. Note that the output format you select for a scheduled report overrides the saved output format for any report. This allows you to choose a different format for the scheduled output, as opposed to running the report within your own browser.
Suppress recipient list	This allows the report scheduler to suppress the names of all the recipients who receive the report.
Suppress reports	By default, ExtraView will always generate and send a scheduled report to all the recipients. If this option is selected, then the entire email is suppressed if there are less than the number of rows on the report. A zero implies that the report is suppressed if there are no results. It is worth noting that if the scheduled report is being prepared for each recipient, as opposed to being prepared once and sent to all recipients, then the report may or may not be generated for each individual user, according to the filters used on the report, such as privacy group. The administrator will have set up the options that enable or disable this functionality.

Once you have filled in the information, you click on the **Set Report Schedule** button in the menubar of the popup window to save your schedule.

Sending Report Output to the Document Repository

This tab sets up the location of the output to which the output report document will be sent when the scheduler runs the report. The document repository is accessed via the **Reports** screen.

No output to the document repository is sent, unless the **Send to Repository** button is set to *Yes*. There is the capability to send the report to either a personal folder within the respository, or to send the document to a shared public folder. Click on the **Select a Different Folder** button to select a different destination folder from the one displayed.

et schedule fo	or report titled: All Issues Created i	in a Year			
HEDULE	DOCUMENT REPOSITORY	EMAIL OUTPUT	ADVANCED DOCUMENT	SECURITY	
	ment Output to Document Re	epository			
Send Docur	nent Output to Document Ro tory No O Yes My Repository	epository		Select a Differer	

Setting up output to the document repository

To select a different folder, simply click on its name in the folder list. You can use a mouse right-click on a folder to create a sub-folder within there. Right-click mouse actions also allow you to delete empty folders. Double-click on the folder title to edit its name.

+ Autosize columns				
Title	Folder		Sort Sequence	
Search *	* Filter Folder *	\sim	* Search *	
My Repository				
Public Repository Documents				
First Quarter Reports	First Quarter Reports			
01-2016 Documents	First Quarter Reports/01-2016 Documents			
02-2016 Documents	First Quarter Reports/02-2016 Documents			
03-2016 Documents	First Quarter Reports/03-2016 Documents			
Second Quarter Reports	Second Quarter Reports			
04-2016 Documents	Second Quarter Reports/04-2016 Documents	s		
Southern Division Folder	Southern Division Folder			
ABC Product	Southern Division Folder/ABC Product			
XYZ Product	Southern Division Folder/XYZ Product			

Selecting a document repository folder

The Advanced Document Security tab allows additional security around documents sent to the repository. The report editor may select individual users, user roles, or user groups. When selected, these options override the standard permissions of visibility, and narrow down the users who may view a document after it is sent to the repository. This is achieved with the Document Visible checkbox. The Document Editor checkbox again overrides the standard permissions for the documents, and controls which users may delete and rename documents within the repository.

eport Schedule Run Now Delete Car	icel Print Page		Schedule a	Repor
schedule for report titled: All Issues Crea	ted in a Year			
EDULE DOCUMENT REPOSITOR	EMAIL OUTPUT	ADVANCED DOCUMENT SECUR	YTI	
ument Repository Security Settin	gs			
	_			
Click button to select and add users				
Select all users in a role to add to schedule	Development Engineer	e		
Click button to select and add user groups				
Role/Group/User	Туре	Document Visible ?	Document Editor ?	
ete Mark Davidson	USER			
ete Mark Davidson ete Greg Goldberg	USER			
ete Greg Goldberg	USER			

More information about the Report Repository can be found here.

Setting Up Email Delivery of the Scheduled Report

Click the **Email Output** tab to setup the recipients of the report, as well as the email subject and email body that will accompany the scheduled report output.

							2
et Report S	Schedule	Run Now De	lete Cancel Print I	Page		Schedul	e a Report 💡
Set sched	ule for rep	ort titled: All Is	sues Created in a Yea	ır			
SCHEDU	E DO	CUMENT RE	POSITORY EMA		NCED DOCUMENT	ECURITY	
Salact D	ocument	Paciniants	Email Subject an	d Body			
				d Dody			
Click button	to select a	and add users	<u>8</u>				
		User ID	User Name	First name	Last name	Company	
Delete	Owner	BSMITH	Bill Smith	Bill	Smith	Superior Software Corp	
Select user	s in a role	* None *	~				
ourout addr	o in a roio	- None -	× 1				
Subject Line							
All Issues C		Year					
Email Body	1						
Source				Styles * Normal *	Font - Size -	<u>·</u> · 🛛 ·	
BI	<u>U</u> S ⇒	K ₂ X ² I _X]= := - E - E 95			Ω 🖽 🗮 🙂 Ω 🛇	
This is the	weekly rep	port.					
ExtraView	Administra	tor.					
div p							

Selecting recipients for a report

Use the **Click button to select and add users to schedule** button to add users to the schedule, or use the **Del** button to remove the user from the schedule. You may only schedule reports to be delivered to licensed ExtraView users, not to any person through an email address. However, it is permissible to schedule a report for delivery to an ExtraView *guest* user so if you need to deliver a scheduled report to a person who is not an ExtraView user, ask you administrator to create a *guest* account with appropriate permissions.

You will usually want to create an accompanying email with the scheduled report. The default **Subject Line** for the email delivery is the title to the report, but you can change this. Use the **Email Body** editor to compose the email that you want to send. Note that if you want to embed an image or logo within the body of the email, that the image must exist on a server that both you and the recipients of the report can access. If any of the recipients are going to be outside the firewall of your company's network, then you should use an absolute path to the image. For example, if you plan to add a company logo as part of your signature to the body of the email, you might include this image with a URL such as *http://www.mywebsite.com/images /company_logo.png*.

The Run Now Feature

Note the button named **Run Now** in the menubar of the popup. When you click this button, the report is immediately sent to the scheduler task and executed. All recipients should receive their copy of the report with this action, within a few moments of clicking the button.

Managing Your Scheduled Reports

On the Query screen, click the button with the title **Manage Scheduled Reports**. This will display a list of all scheduled reports for which you are the owner. From this screen you can edit the schedule for any report that has an existing schedule.

Cancel Print Page				Scheduled I	Reports 🔋
Hide Filters					
Filter List					
Select the column to use as a filter for the list. You pattern, including wildcards (*). The Export button or				ou may enter a se	arch
Select filter column for report	0	Owner 🗸			
or click on a letter	E	B <all> <none></none></all>			
or enter a search expression and click the ${\bf Go}$ but	ton Er	Enter search expression	Go Export		
Owner Running as Enabled	Title ID Fre	equency Last Scheduled Run	Next Scheduled Run	Date Created	Message
Edit Delete Bill Smith Administrator No	My Open 79 We Issues	eekly	Jnscheduled J	Jan 14, 2013	New
Edit Delete Bill Smith Development Yes Engineer	Assigned To 643 Mor by Status Day		May 2, 2016 12:00:00 F AM		Pending : SUCCESS
Cancel Print Page			2 record(s) selected from a t	otal of 2 record(s)

Managing your scheduled reports

Note that in order to be able to alter the schedule, you must be the person who created the schedule. The exception to this is that the administrator may also modify the schedule for all scheduled reports.

Document Repository

The document repository is accessed via the **Reports** screen. Users may send documents to the repository from the report scheduler, either on an immediate basis, or on a timed basis according to the schedule they create for the report. The user may store documents in a personal repository or within a public, shared repository. Permission from the administrator is required to write documents to the repository and separate permission is required to download documents from the repository.

Documents are saved in the repository by scheduling the report and setting the folder within the repository into which you want the document to be saved. You may create an automated naming convention to store your documents, for example indicating the year and month within which the report was created.

Reports sent to the repository are termed documents. These are viewed from the **Reports** screen, following the list of reports that a user may run. The repository documents may be stored in folders and sub-folders. Similar to reports, these can be personal in nature, stored in the **My Documents** section, or public, stored within the **Public Documents** section.

Sending Documents to the Repository

From a report editor of a saved report that supports being scheduled, click on the **Schedule Report** button. Then click on the **Document Repository** tab.

	ule Run Now Delete Cancel				Schedule a Report
CHEDULE	DOCUMENT REPOSITORY	EMAIL OUTPUT	ADVANCED DOCUMENT	SECURITY	
CHEDOLE					
	nent Output to Document R	epository			
Send Docun	nent Output to Document R	epository			
Send Docun	nent Output to Document R tory ● No O Yes My Repository	epository		Select a Different	

Setting up the Report Scheduler to Send a Document to the Repository

From the **Document Repository** tab, you set up output to the repository with the button **Send to Repository**, and then you select the folder in the repository to which you want the document to be placed when the report scheduler runs.

Directions			
Click on the folder you want to select. Yo folders by right-clicking on the folder and	u can create a new folder by right-clicking or selecting the appropriate option.	n the folder to contain the new folder	and you may rename or delete
+ — Autosize columns			
Title	Folder	Sort Sequence	
* Search *	* Filter Folder *	✓ * Search *	
My Repository			
Public Repository Documents			
🖃 🧮 First Quarter Reports	First Quarter Reports		
01-2016 Documents	First Quarter Reports/01-2016 Docur	nents	
02-2016 Documents	First Quarter Reports/02-2016 Docur	nents	
03-2016 Documents	First Quarter Reports/03-2016 Docur	nents	
🖃 🧮 Second Quarter Reports	Second Quarter Reports		
04-2016 Documents	Second Quarter Reports/04-2016 Do	cuments	
🖃 🗐 Southern Division Folder	Southern Division Folder		
ABC Product	Southern Division Folder/ABC Produ	ct	
XYZ Product	Southern Division Folder/XYZ Produ	ct	

Select a Document Folder for Repository Output

Within the popup where you select the folder, you can also create new folders and sub-folders. Simply right-click on the folder beneath which you wish to create a new folder, and a *New Folder* appears. Name this folder appropriately.

There is a tab name **Advanced Document Security** which is used to override the standard permission settings for controlling access to documents. Within this tab, you can set specific permissions for the document being output. See <u>here</u> for more information.

Virtual Folder Names

Within the document repository it is often useful to collect documents for similar purposes under the same folder. The user has no ability to alter the name of the folders as documents are being created for insertion into the repository, as the report scheduler creates the documents automatically.

For example, you might want to place all the documents generated for a specific month into the same folder, or you might want all the documents generated about a specific product placed in the same folder. To facilitate this requirement, you can create a folder with a virtual name. The ExtraView report scheduler will use the information within the virtual name to automatically create folders as necessary. For example, when a new month starts and the report scheduler creates a new document for insertion into the repository, a new folder will be created automatically.

The date-based tokens you can use to create a virtual folder are:

- \$\$DAY\$\$ The numeric day of the current month
- \$\$MONTH\$\$ The numeric month of the current year. Note that month names are not supported to ensure readability of the months by non-English language users and to ensure that the months will be kept in a reasonable sort order within the repository
- \$\$YEAR\$\$ The current year as a 4-digit number

The tokens can be interspersed with normal text. For example, a virtual folder name of **Monthly reports** for **\$\$MONTH\$\$-\$\$YEAR\$\$** will be actualized as **Monthly reports for 02-2016** when the current month is February 2016.

Sending Documents to the Repository Without a Schedule

There are occasions when you might want to send a report output to the document repository without setting up a schedule for the report. To achieve this, from the report editor, click on the **Schedule Report** button, click on the **Document Repository** tab, set the folder as necessary and choose to send the report to the repository, then click on the **Run Now** button.

Accessing Documents in the Repository

From the **Reports** screen, click on the **View Documents** button within the **Document Repository** section of the screen.

Print Page					ExtraView Report ?
Create New Report					
New column report	😥 New planning report	New custom URL report			
Σ New summary report	🔀 New chart	New container for existing reports			
New matrix report	88 New taskboard report	New layout for existing reports			
X New aging report	New treegrid report				
9 New calendar report	1 New dashboard report				
Output Options					
Output to saved format	500 rows per page				
Saved Reports			Manage User Groups	Manage Scheduled Reports	Manage Report Folders
Title		Description			
* Search *](* Search *]		
My Reports					
Public Reports					
Shared Reports					
Document Repository				Ma	anage Repository Folders
🗘 + — Autosize columns					
Title		Description	Date Created		
* Search *	* Search *				
B My Documents					
Report of Open issues	By Bill		Mar 6, 2016		
Monthly reports for 04-2016					
Public Documents					
Open Issues Not Addressed	Issues from the last v	week showing the Originator and Requestor	a Mar 6, 2016		
Southern Division Folder					
First Quarter Reports Second Quarter Reports					
Second Quarter Reports					

The Document Repository on the Reports Screen

You may drag and drop documents between folders within the document repository. However, you may not alter a public document to become a personal document and vice versa. Righ-clicking with your mouse on a document allows you to view, download or, with permission, to delete the document.

You may view or download any document by simply clicking on its title. If you have permission, you may use the right-click mouse button to delete the document. If you click on the gear wheel in the controls for the repository, you will see additional columns as follows:

Image: Select Columna C	Document	Repository					Manage Repository Folders
* Fitter * * Search * * Fitter Folder * * Search * * My Documents By Bill Mar 6, 2016 5 * Monthly reports for 04.2016 Monthly reports for 04.2016 5 * Public Documents Issues from the last week showing the Originator and Requestor a Mar 6, 2016 6 * Fitzer Variation of the state o	<u>ه</u>	Autosize columns Delete Selected Documents					
Image: Second Quarter Reports By Bil Mar 6, 2016 5 Image: Second Quarter Reports Buses from the last week showing the Originator and Requestor a Mar 6, 2016 6	Select	Title	Folder	Description	Date Created	Document ID	
Image: Report of Open issues By Bil Mar 6, 2016 5 Image: Report of Open issues Monthly reports for 04 2016 5 Image: Report of Open issues Monthly reports for 04 2016 5 Image: Report of Open issues Not Addressed Issues from the last week showing the Originator and Requestor a Mar 6, 2016 Image: Report of Open issues Not Addressed Issues from the last week showing the Originator and Requestor a Mar 6, 2016 Image: Report of Open issues Not Addressed Issues from the last week showing the Originator and Requestor a Mar 6, 2016 Image: Report of Open issues First Quarter Reports Image: Report a Mar 6, 2016	* Filter * 🗸	* Search *	* Filter Folder *	Search *		* Search *	
Monthly reports for 04-2016 Monthly reports for 04-2016 Monthly reports for 04-2016 Public Documents If Open Issues Not Addressed If Open Issues Not Addressed First Quarter Reports First Quarter Reports Second Quarter Reports Second Quarter Reports		🕂 🛄 My Documents					
Public Documents Isues from the last week showing the Originator and Requestor a Mar 6, 2016 First Quarter Reports First Quarter Reports Second Quarter Reports Second Quarter Reports		- Report of Open issues		By Bill	Mar 6, 2016	5	
If Open Issues Not Addressed Issues from the last week showing the Originator and Requestor a Mar 6, 2016 6 Image: Second Quarter Reports First Quarter Reports Second Quarter Reports 6		Monthly reports for 04-2016	Monthly reports for 04-2016				
Figure Insues for Addressed issues from the last week showing the Origination and Requestor a main 6, cV 10 0		e 🔤 Public Documents					
Second Quarter Reports Second Quarter Reports		- II Open Issues Not Addressed		Issues from the last week showing the Originator and Requestor a	Mar 6, 2016	6	
Second Quarter Reports Second Quarter Reports		First Quarter Reports	First Quarter Reports				
📃 🔹 📾 Southern Division Folder Southern Division Folder		Second Quarter Reports	Second Quarter Reports				
		Southern Division Folder	Southern Division Folder				

Extended Repository Options

From this view, you can click on multiple documents, and delete them. Use the Select checkbox to identify the documents you want to delete. In addition you see additional information about the documents stored.

Report Folders

Reports are stored in report folders. Folders may contain other folders in a hierarchy.

The top level folders are fixed and contain Personal Reports and Public Reports. Personal Reports are reports that you create and manage yourself. With permission from the admnistrator, you can share a report within your Personal folders.

With permission you can create Public reports which will be visible to all users. You can also create reports that can only be shared with users of a specific role. There is no need to share a Public report with specific users.

Note that when a report is shared with other users, whether it be a Public report, a report shared with users in role or a report shared with specific users, there is no guarantee that users who view the report will be able to see all the fields or all the issues within the report. There may be field-level security permission, or privacy of issues that prevent the visibility of such information.

Note that you can double-click on any report within the report folders, and providing you have permission, you can alter the report title or description, without needing to endter the report editor. You may also drag a report from one folder to another. However, you cannot drag a private report to a public report folder, or vice versa.

End User Guide

Create New Report If New column report In New calendar report New summary report New planning report New matrix report New chart New aging report New chart Output Options Output to saved format 100 rows per page Saved Reports Manage User Groups Manage Scheduled Reports Manage Report Folders Saved Reports Manage User Groups Manage Scheduled Reports Manage Report Folders Eath Assigned To By Status - Assigned To By Status Group By Report Manage Scheduled Reports Eath Breakdown of Customer Issues - Custom Pie Chart Eath Breakdown of Statuses for Customer Issues - Custom Bar Chart Eath Breakdown of Statuses on a PDF Report - How a PDF Report is Generated Eath Grouping Statuses on a PDF Report - How a PDF Report is Generated Eath Report of Open issues - By Bill Statu Report of Open issues - By Bill Status Report of Open issues - By Bill Eath Report of Open issues - By Bill Status Report of Dugs by Category - Counting new, open and fixed bugs only Eath Report of Dugs by Category - Counting new, open and fixed bugs only	Print Page ExtraView Report
∑ New summary report ∑ New planning report ∴ New container for existing reports ∴ New matrix report ∑ New chart ∑ New layout for existing reports ☑ New aging report ∴ New dashboard report Output Options ○ Output to saved format ↓ 100 rows per page Saved Reports Manage User Groups Manage Scheduled Reports ☑ My Reports ☑ Edit Assigned To By Status - Assigned To By Status Group By Report ☑ Edit Assigned To By Status - For a Group By Report ☑ Edit ☑ Edit Breakdown of Customer Issues - Custom Bir Chart ☑ Edit ☑ Edit Breakdown of Statuses for Customer Issues - Custom Bar Chart ☑ Edit ☑ Edit Bugs I Fixed in January - Bugs not Closed Yet ☑ Edit ☑ Edit Bugs I Fixed in January - Bugs not Closed Yet ☑ Edit ☑ Edit Grouping Statuses on a PDF Report - How a PDF Report is Generated ☑ Edit ☑ Edit Owners of open bugs - Sorted by owner ☑ Edit ☑ Edit Report of Open issues - By Bill ∑ Edit ☑ Edit Report of bugs by Category - Counting new, open and fixed bugs only ☑ Folder with all reports that prepare PDF's ☑ <td>Create New Report</td>	Create New Report
∑ New summary report ∑ New planning report ∴ New container for existing reports ∴ New matrix report ∑ New chart ∑ New layout for existing reports ☑ New aging report ∴ New dashboard report Output Options ○ Output to saved format ↓ 100 rows per page Saved Reports Manage User Groups Manage Scheduled Reports ☑ My Reports ☑ Edit Assigned To By Status - Assigned To By Status Group By Report ☑ Edit Assigned To By Status - For a Group By Report ☑ Edit ☑ Edit Breakdown of Customer Issues - Custom Bir Chart ☑ Edit ☑ Edit Breakdown of Statuses for Customer Issues - Custom Bar Chart ☑ Edit ☑ Edit Bugs I Fixed in January - Bugs not Closed Yet ☑ Edit ☑ Edit Bugs I Fixed in January - Bugs not Closed Yet ☑ Edit ☑ Edit Grouping Statuses on a PDF Report - How a PDF Report is Generated ☑ Edit ☑ Edit Owners of open bugs - Sorted by owner ☑ Edit ☑ Edit Report of Open issues - By Bill ∑ Edit ☑ Edit Report of bugs by Category - Counting new, open and fixed bugs only ☑ Folder with all reports that prepare PDF's ☑ <td>📝 Now column report</td>	📝 Now column report
New matrix report New chart New layout for existing reports New aging report New dashboard report Output Options Output to saved format 100 rows per page Saved Reports Manage User Groups Manage Scheduled Reports Image Report S Manage User Groups Manage Scheduled Reports Image Scheduled Reports Image Report Folders Image Scheduled Reports Manage Report Folders Image Scheduled Reports Image Report Folders Image Scheduled Reports Manage Report Folders Image Scheduled Reports Image Report Folders Image Scheduled Reports Manage Report Folders Image Scheduled Reports Image Report Folders Image Scheduled Re	
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Output Options Output to saved format IOUtput to saved format IOU rows per page Saved Reports Manage User Groups Manage Scheduled Reports Manage Report Folders Manage Composition	
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Saved Reports Manage User Groups Manage Scheduled Reports Manage Report Folders Image Content Image Conten Image Content I	Output Options
 C My Reports Edit All Feature Requests - That are open ✓ Edit Assigned To By Status - Assigned To By Status Group By Report ✓ Edit Assigned To by Status - For a Group By Rport ✓ Edit Breakdown of Customer Issues - Custom Pie Chart ✓ Edit Breakdown of Statuses for Customer Issues - Custom Bar Chart ✓ Edit Bugs I Fixed in January - Bugs not Closed Yet ✓ Edit Grouping Statuses on a PDF Report - How a PDF Report is Generated ✓ ✓ Edit My Hot List - Priority 1 issues that are not closed ✓ Edit Report of Open issues - By Bill ✓ Folder with all reports that prepare PDF's 	Output to saved format 100 rows per page
 My Reports Edit All Feature Requests - That are open Edit Assigned To By Status - Assigned To By Status Group By Report Edit Assigned To by Status - For a Group By Rport Edit Breakdown of Customer Issues - Custom Pie Chart Edit Breakdown of Statuses for Customer Issues - Custom Bar Chart Edit Bugs I Fixed in January - Bugs not Closed Yet Edit Grouping Statuses on a PDF Report - How a PDF Report is Generated Edit My Hot List - Priority 1 issues that are not closed Edit Report of Open issues - By Bill Edit Report of Open issues - By Bill Folder with all reports that prepare PDF's 	
Image: Figure 1 Figure 2 Image: Figure 2 Figure 2 Image: Figure 2<	Saved Reports Manage User Groups Manage Scheduled Reports Manage Report Folders
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	- ☑ Edit Open issues - For PDF output
- ⊠ Edit Open issues - For PDF output	- ☑ Edit Summary chart - For inclusion on container
	Edit Summary of Closed Customer Issues - By Product
Edit Summary chart - For inclusion on container	
 Edit Summary chart - For inclusion on container Edit Summary of Closed Customer Issues - By Product Edit Summary of Fixed Customer Issues - By Product 	Edit Summary of Open Customer Issues - By Product
 Edit Summary chart - For inclusion on container - ∑ Edit Summary of Closed Customer Issues - By Product - ∑ Edit Summary of Fixed Customer Issues - By Product 	Edit Feature Requests - Open Requests By Product and Category
- ∑ Edit Summary chart - For inclusion on container - ∑ Edit Summary of Closed Customer Issues - By Product - ∑ Edit Summary of Fixed Customer Issues - By Product - ∑ Edit Summary of Open Customer Issues - By Product - ∑ Edit Summary of Open Customer Issues - By Product - ∑ Edit Summary of Open Customer Issues - By Product - ∑ Edit Feature Requests - Open Requests By Product and Category	

Report Folders

Creating New Reports & Output Options

Print Page			ExtraView Report
Create New Report			
II New column report	New calendar report	New custom URL report	
Σ New summary report	🧮 New planning report	New container for existing reports	
New matrix report	🔀 New chart	New layout for existing reports	
New aging report	New dashboard report		
Output Options		1	
Output to saved format	▼ 100 rows per page	1	
Saved Reports		Manage User Groups Manage Scheduled Reports	Manage Report Folders
Edit Assigne	ıre Requests - That are open d To By Status - Assigned To By d To by Status - For a Group By F		

Creating New Reports and Report Options

Click on a report type at the top of the screen to create a new report. This takes you to the report editor where you can compose a report before saving it.

You can use the remaining options as follows:

- **Output Options** When you click on a report to run it, the output will appear in the report destination that you have saved within the report editor. The default output option is to use this saved format as the destination. However, you may override this by selecting a different report destination. Note that if the report destination is not the browser, you will see this by holding the mouse over the report title. The help tip will show its default destination. The available output formats are:
 - **Browser** the report results will appear in a browser window, using HTML to render the results. This is the default for most report output. Calendar, Dashboard and Planning reports can only output to the browser
 - **Text-** this outputs the report to text, appearing within a browser window. You can save the text from your browser to a file for further use
 - **Microsoft Word** this requires Microsoft Word to be installed on the user's computer and outputs the report directly into a Word document. Note that no images, buttons or links are output with this format
 - Adobe PDF (Portrait) This requires the Adobe PDF Reader software to be installed on the user's computer. The report output will appear within an Adobe PDF window and in Portrait format. Container reports may only be output to Adobe PDF files
 - Adobe PDF (Landscape) This requires the Adobe PDF Reader software to be installed on the user's computer. The report output will appear within an Adobe PDF window and in Landscape format. Container reports may only be output to Adobe PDF files
 - **Microsoft Excel (formatted output)** This outputs the report with basic formatting to Microsoft Excel, which must be installed on the user's computer. Charts cannot be output directly to Microsoft Excel
 - **Microsoft Excel (plain output)** This outputs the report with no formatting to Microsoft Excel, which must be installed on the user's computer. Charts cannot be output directly to Microsoft Excel
 - Microsoft Excel (merge with uploaded file) This outputs the report to a Microsoft Excel

spreadsheet. To prepare this output format, a spreadsheet is first uploaded into ExtraView, and ExtraView will send its data to a sheet within the file. Other sheets within the file may manipulate this data and perform any actions of which Excel is capable. Microsoft Excel must be installed on the user's computer. This output option is only available with Column reports

• **Rows per Page** - This allows you to set the rows per page for the report to use, when output to the browser. This value is remembered once it is set. Note that this option is only used with Column reports and queries that produce a Quicklist report.

Report Filters

Setting up report filters is identical to setting up query filters. Please see the section on <u>Querying</u> for details.

Runtime Filters

It is often desirable to create a report that can be used with different filters. For example, you may want to create a report which filters using different start and end dates, or you may want to create a report which when run will show the results for a different business area.

This can be accomplished using runtime filters. Within each filter list, you will see an entry * Ask at **runtime** *. If you select this entry, then when you run the report, you are asked for a value for this filter. If you do not choose one, the report is still produced, using the * Any * filter, i.e. all values are chosen as if there is no filter.

You can create a runtime filter for a text, date or other numeric type field, by entering **\$\$RUNTIME\$\$** in the field. This is saved with the report and you are asked at runtime for a value to use as a filter.

Note that if you intend to use runtime filters within a report container, then each report that is included in the report container must have the identical runtime filters defined. If you do not do this your runtime filters will be ignored for the execution of the container report and no error occurs.

Reports with runtime filters cannot be placed on a user's Home Page as a report. This is because it is undesirable to stop the preparation of a Home Page and ask a user to input values for filters.

Isues 7.0 Fixed 40	fresh	Turn On Record Selector	Group Issues Ma	ass Update Issues	Return	Export Results	Fiters	Print Page		ExtraViev	v Quicklist R	eport
Provide values for the following filter(s) for the report Field Operator Value Area = Engineering Issues AND Product = ExtraView AND Committed Release = 7.0	ords 1	to 100 of 1,484 🕨										
Field Operator Value Area = Engineering Issues												
Area = Engineering Issues AND Product = ExtraView AND Committed Release = 7.0	Provide	e values for the followin	g filter(s) for the repor	t								
AND Product = ExtraView AND Committed Release = 7.0 Re-Run Report			Field		Opera	tor Valu	ie					1
AND Committed Release = 7.0 Re-Run Report Issues 7.0 Fixed 40			Area		-	= Eng	ineering Is	sues 💌				
Re-Run Report		AND	Product			= Ext	raView		•			
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Re-Run Report												0
												ir:
								Fixed			80	

```
Runtime filters
```

There are occasions when you might want to run a report that has a complex set of filters, including the use of several **and** and **or** conjunctions. For example, you might want to pose the following query filters (this is not a real query, but it is useful as an example):

```
(Customer = * Ask at runtime * AND Status = Open)
OR (Customer = * Ask at runtime * AND Status = Fixed)
OR (Customer = * Ask at runtime * AND Status = Duplicate)
```

This would be represented in the report editor like this:

Query Filters				
	Select Field		Operator	Value
*=	Customer(CUST_LIST)	•	equals 💌	STH Computers Super Corp Trapeze Networks Westminster * Choose the Customer * *
🕈 = and 💌	Status(STATUS)	•	equals 💌	Open Fixed Closed Duplicate Not Found
* = or 💌	Customer(CUST_LIST)	•	equals 💌	STH Computers Super Corp Trapeze Networks Westminster (E) * Choose the Customer * T
* = and 💌	Status(STATUS)	•	equals 💌	Fixed Closed Duplicate Not Found * Choose the Customer * •
🔹 🖿 or 💌	Customer(CUST_LIST)	•	equals	STH Computers Super Corp Trapeze Networks Westminster * Choose the Customer * *
Image: A stand in the stand	Status(STATUS)	•	equals 🔻	Fixed Closed Duplicate Not Found * Choose the Customer *
	and the second			and the second

Setting up a complex query with runtime filters

When the report is run, the user will see the following screen:

Run Report	Cancel	Print Page			Report that uses session varial	bles
				llowing field(s), and wil entering the same filter	I substitute the value(s) you select into all the runtime filter value several times.	
		Filt	er Field	Value	to be used in substitution	
		Cho	oose the Customer	* Any * * None Bank of Bear In Chrysle	f America c.	
Provi	ide values fo	or the follow	ving filter(s) for the re			
			Field	Operator	Value	
			Customer	=	* Any * * None * Bank of America Bear Inc. Chrysler •	
	А	ND	Status	=	Open	
	C	DR	Customer	=	* Any * * None * Bank of America Bear Inc. Chrysler *	
	А	ND	Status	=	Fixed	
	C	DR	Customer	=	* Any * * None * Bank of America Bear Inc. Chrysler •	
	А	ND	Status	=	Duplicate	
Run Report	Cancel	Print Page				
	Gunder	age				

Running a complex query with runtime filters

When the user selects a customer from the top list, all the bottom filters that require a Customer will be set to use the value set from the top list. To accomplish this type of query with complex runtime filters, your administrator will have set up some special fields to use as runtime filters that can propogate their value to all filters.

Changing Filters after Running a Report

Once you have your report results, it is sometimes useful to be able to alter the value of the filters you selected, and view the new results. To achieve this, there is a button with the title **Filters** on the menubar. When you select this, a window pops up and allows you to reset the values of any of the filters, then immediately re-run the report.

Turn On	Record Selector	r Group Issues	Mass Updat	e Issues Ref	turn Export Results Filte	s Print Page	ExtraView Qui	cklist Report
to 100 o	f 1,484 🕨					<		
ninoorin		Product - Extral	liow AND Co	mmitted Deler	200 - 7.0			
			New AND CO	minitted Kelea	136 - 7.0	\		
y our r								
	Issue # 🔻	Category =	Title =				Found in Release	Assigned To
	Area =	Module =	Status =	Priority =	Committed Release	Branch Status =	Fixed-in build # =	Customer =
Edit	241721	Product Bug	User can en	ter invalid nan	nes for user groups		N/A	John Kienitz
QEdit	Engineering Issues	User Groups	Fixed	P 2	7.0	Fixed	40	
Edit	241703	Product Bug	QA-Worksp	ace-Report-Im	age icons not replaced with	different reports	7.0	Brent Thorington
QEdit	Engineering Issues	Workspace GUI	Open	P 3	7.0	Open		Kricon Solutio
Edit	241700	Product Bug	Uploading E	xcel template	s for merging data is broke	ı	7.0	Carl Koppel
QEdit	Engineering Issues	Search / Report	Can't Reproduce	P 2	7.0	Can't Reproduce		
	to 100 o gineering y Carl k Edit QEdit Edit QEdit Edit	to 100 of 1,484 gineering Issues AND y Carl Koppel on 10/4 Issue # Area = Edit 241721 QEdit Engineering Issues Edit 241703 QEdit Engineering Issues Edit 241700 QEdit Engineering	to 100 of 1,484 pineering Issues AND Product = Extra\ y Carl Koppel on 10/4/11 2:07 PM Issue # ▼ Category = Area = Module = Edit 241721 Product Bug QEdit Engineering User Groups Issues Edit 241703 Product Bug QEdit Engineering Workspace Issues GUI Edit 241700 Product Bug QEdit Engineering Search /	to 100 of 1,484 pineering Issues AND Product = ExtraView AND Cor y Carl Koppel on 10/4/11 2:07 PM Issue # ▼ Category = Title = Area = Module = Status = Edit 241721 Product Bug User can en QEdit Engineering User Groups Fixed Issues User Groups Fixed Edit 241703 Product Bug QA-Worksp QEdit Engineering Workspace Open Issues GUI Edit 241700 Product Bug Uploading E QEdit Engineering Search / Can't	to 100 of 1,484 pineering Issues AND Product = ExtraView AND Committed Relea y Carl Koppel on 10/4/11 2:07 PM Issue # ▼ Category = Title = Area = Module = Status = Priority = Edit 241721 Product Bug User can enter invalid nan QEdit Engineering User Groups Fixed P 2 Issues Edit 241703 Product Bug QA-Workspace-Report-Im QEdit Engineering Workspace Open P 3 Issues GUI Edit 241700 Product Bug Uploading Excel template QEdit Engineering Search / Can't P 2	to 100 of 1,484 pineering Issues AND Product = ExtraView AND Committed Release = 7.0 y Carl Koppel on 10/4/11 2:07 PM Issue # Category = Title = Area = Module = Status = Priority = Committed Release Edit 241721 Product Bug User can enter invalid names for user groups QEdit Engineering User Groups Fixed P 2 7.0 Issues User Groups Fixed P 2 7.0 Edit 241703 Product Bug QA-Workspace-Report-Image icons not replaced with QEdit Engineering Workspace Open P 3 7.0 Issues GUI Edit 241700 Product Bug Uploading Excel templates for merging data is broker QEdit Engineering Search / Can't P 2 7.0	Interview Interview	to 100 of 1,484 pineering Issues AND Product = ExtraView AND Committed Release = 7.0 y Carl Koppel on 10/4/11 2:07 PM Issue # Category = Title = Area = Module = Status = Priority = Committed Release = Branch Status = Fixed-in build # = Edit 241721 Product Bug User can enter invalid names for user groups N/A QEdit Engineering User Groups Fixed P 2 7.0 Fixed 40 Edit 241703 Product Bug QA-Workspace-Report-Image icons not replaced with different reports 7.0 QEdit Engineering Workspace Open P 3 7.0 Open Issues GUI Uploading Excel templates for merging data is broken 7.0 QEdit Engineering Search / Can't P 2 7.0 Can't Reproduce

Altering filters after you have run a report

Note that if you set the value of any filter to * **Any** *, then you cannot reuse the **Filters** button a subsequent time on the same filter. When set to * **Any** *, the filter is removed from the list.

Report Definitions

All report editors have a checkbox option titled **Output Report Definition**. When this is selected, the report is displayed in the normal way. However, for Browser, Microsoft Word, and Adobe PDF output, the report is followed by two sections, the first displaying all the options selected for the report output, such as the title, columns being displayed and the sort order. The second section shows the filters used to create the report.

Report	Title	Taskboard			
	Description	Issue Status by Assigned To			
Report		TaskBoardRep			
Report		802			
Filter T	уре	Expanded			
Query	Туре	Advanced			
SLA us	sed				
Report	ing Hierarchy used				
Transp	orted output(Y/N)	N			
Display	for mobile(Y/N)	Ν			
X Axis	fields	Status(STATUS	8)		
Y Axis	fields	Assigned To(AS	Assigned To(ASSIGNED_TO)		
Title fields		ID #(ID) Title(SHORT_DESCR)			
Description fields		Originator(ORIC Priority(PRIORI Product(PRODI Module(MODU Severity(SEVE	TY) UCT_NAME) LE) RITY_LEVEL) n(QUICKEDIT_BUTTON) T_BUTTON) EW_BUTTON)		
Repo	rt Filters				
	Field	Operator	Value		
	Business Area	=	Bugs		
AND	Status	=	New Open Fixed Closed		
AND	Product	=	Tracker Enterprise		

User Groups

User groups provide the ability to create an arbitrary list of users with whom you wish to share a report. If this feature has been enabled by your administrator, you will see the button **Manage User Groups** on the **Reports** screen. When you enter the feature, you will see a screen similar to this:

			ups of users. Groups of users ar	e arbitrary collections of peop	ole that are primarily	
sed for p	ourposes su	ich as sharing reports.				
lew C	reate a new	user group				
		Group Name	Group Title	Owner	Created	Last updated
Edit	Del	Group Name CTI	Group Title CTI	Owner Bill Smith 10/5/11 8:05 AM	Created Bill Smith 10/5/11 8:05 AM	Last updated Bill Smith 10/5/11 8:06 AM
Edit Edit	Del			Bill Smith	Bill Smith	Bill Smith

Manage User Groups

With permission, you can create a new ad hoc group of users, and maintain the list of users within the groups.

Reporting on Hierarchies

Note: This feature is not available to installations that use the Apache Derby database. There are limitations within the implementation of the database that preclude this feature from working.

This feature works with Column Reports, Summary Reports, Matrix Reports, Planning Reports and Calendar Reports.

Your administrator may have defined hierarchies for reporting. These allow you to select records at a parent level, and at up to seven child levels for reporting. You may choose to view different fields on a column report for each of the different hierarchy levels, and you may apply different filters to each of the hierarchy levels. In addition, there are functions available that allow you to aggregate the count of the number of issues at each level in the hierarchy.

Note: You must be in the Advanced Query Screen mode to create reports that use reporting hierarchies.

An example of a hierarchy report is that you may want to show a list of all issues by customer, showing details from the *Customer* business area for each customer, while showing details from the *Customer Issues* business area for each issue. The following screen shows how this may be set up.

Run Report Save Report Save As Clear All	Cancel Print Page				ExtraView Column Report 👔
Column Report Options					
Report title Customer Issues					
Description Provide the customer name when	you run the report				
Browser	 			e SLA ? * None *	\checkmark
500 rows per page 🗸 🗸			Transpose row Display on I		
Customers>Issues			Output Report Def		
Drag or double-click fields to select, drag	fields to remove or change order	Drag or d	ouble click up to 8 fields	s to set sort order	
Find a field	Show field names	Find a field		Show field names	
2nd Fold title	View Button	Actual Renewal Date		_ □ ID #	
Abstract	Edit Button	Actual Time (hrs)			
Actual Renewal Date	ID #	Application			
Actual Time (hrs)	Customer Name	Approved by			
Address	Customer Contact	Asset Type			
Application	Contact Phone	Assigned To			
Approved by		Automated			
Asset Type		Building			
Asset details		Bus. Priority		_	2 2
Assigned To		Business Area		-	
Attachments	×	Case Status		~	
Display Fields Buttons Expressions					
Query Filters O Standard	Condensed Filters	* Saved filter list	• ~		Filter Child Values 👔
Advanced	O Expanded Filters	Save / Update Fi	ilters ?		Filter Multi-Valued Field Values 🛜 🗌
Base level					
Select Field	Oper	ator Value			
Business Area(AREA)	v) equ	als 🗸 Customer Iss	ues 🗸		
V Issues		Perform aggregate fun	ction on results 김 🗌 I	nclude parents without child	dren ?
Find a field	Show field names		lect Field		Operator Value
Date of Last Status Change Days Open	Edit Button		usiness Area(AREA)		✓ equals ✓ Customer Issues ✓
Days Since Last Updated	D ID #	and V C	ustomer Name(CUST_LIS	ST)	✓ equals ✓ * Ask at runtime * ✓
Days in Status	Status			,	
Description	Product				
Documentation	Title				
Documentation Impact?	Description				
Due by					
Email Address					
Employee Department					
Employee Name	×				
Display Fields Buttons Expressions					
* Add a new Reporting Hierarchy to Base Level *	~				
Run Report Save Report Save As Clear All	Cancel Print Page				

Creating a hierarchical report

First, make certain you are in **Advanced Query Mode**. Next, you select the hierarchy from the available list of hierarchies within the options section of the report design screen. When you do select the hierarchy, the screen refreshes and you will see a field selection list for each level of the hierarchy, as well as a set of filters to be used for each level of the hierarchy.

The report output will show all the fields selected at all levels of the hierarchy, in the order they appear over all the selection lists.

For each level of the hierarchy, you can apply any filters required for that level in the hierarchy.

Note the checkbox option in the report editor that appears at each level of the hierarchical filters, with the label **Include parents without children**. If you select this option, parent records will appear on the output, whether or not there are any child records to display. These parent records are suppressed if you do not choose this option.

After following these instructions, you may see a report similar to the next screenshot.

ustonici	rs and their Issu	les						Refresh	Group Issues	Update Issues	Retu	urn Print Page
											Re	cords 1 to 17 of
lusiness Area	a = Customer Issues											
repared by B	ill Smith on 6/12/07 1:49	PM										
Customer	Customer Contact	Phone Number	Customer Email	ID #	Product	Category	Title				Status	Assigned To
Coca-Cola	Wilson	(232)323-2323	wilson@wwww.com	10483	Tracker	Packaging		ement report in standby m		put of the amplifier	Fixed	Bill Smith
Coca-Cola	Wilson	(232)323-2323	wilson@wwww.com	10488	Tracker	Software	Custor	mer called loo	king for a new co	by of documentation	Fixed	SCM Daemon
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10482	Tracker	Software		ss needed re rrect result	started before the	screen would show	Fixed	Greg Goldberg
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10489	Tracker	Packaging	lkjh				Fixed	George Miller
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10490	Tracker	Software	The co reboot		d resetting before t	the system would	Fixed	Jimmy Duncan
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10491	Tracker	Documentation	Custor	mer reports a	in issue with instal	ation	Fixed	Jimmy Duncan
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10496	Tracker	Software	Test c	ustomer issu	e		Fixed	George Miller
Evian	George Jones	(222)222-2222		10485	Tracker	Software	asdfgl	1			Fixed	Bill Smith
NTT	Suzuki	(232)323-2323	s@ntt.com	10472	Tracker Enterprise	Software	We ha	ve an NTT is	sue here		Fixed	Jimmy Duncan
Hewlett Packard	Chris Black	(232)323-2323		10473	Tracker Enterprise	Software			a problem with th stall it incorrectly	e widget when a	Fixed	Jimmy Duncan
Hewlett Packard	Chris Black	(232)323-2323		10474	Tracker Enterprise	Packaging	Proble	m with packs	iging		Fixed	Susan Green
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10469	Tracker	Documentation	This is	an issue rep	orted by Chrysler		Fixed	Chris Robinson
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10470		Documentation	When	an issue is e	ntered here, we si	nould see it on a	Fixed	Bill Smith
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10471		Documentation	this on	e has a long	e entered on beha er title than the last need to scroll		Fixed	Bill Smith
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10484	Tracker	Software	sdfghj				Fixed	George Miller
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10486	Tracker	Software	zdgfhj				Fixed	Bill Smith
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10487	Tracker	Documentation	kljhg				Fixed	Greg Goldberg
											Re	cords 1 to 17 of
								Refresh	Group Issues	Update Issues	Retu	urn Print Page

Sample output of Hierarchical Report

Column reports support a special type of hierarchical reporting, called side-by-side hierarchies. Reporting hierarchies are defined with a chain of descending levels, such in ways such as parent, child, and grandchild levels. With side-by-side hierarchies, the user can select multiple, independent hierarchies, all with the same base (top) level, and place the results side-by-side on the report output. For more information, click <u>here</u>.

Aggregation

In the report editor, you can turn on aggregate counting functions for child levels within a hierarchical report. For example, you may want a count of *Fixed* issues for each customer. This implies that you need to display each customer from the Customers business area and then count the *Fixed* issues.

Expression - Day Expression - Decimal	Turning on a	aggregate functions
Expression - Number		
Expression - Text Field		Alternate Field Title
Extension Number		Count of Issues
Fax Number	100	
Floor Number		Aggregate Function
Historical Product Reference		and the second se
0#		Count
P Address		
installed OS		

Aggregate functions

This may be achieved by a variant of the above report. First, you check the box against the prompt **Perform aggregate functions on results**. The list of fields at the child level of the query (in this case the *Issues* level) will clear. Select a field and you may then use your right-hand mouse button to access the output options for the field. In our example, we can *count* the ID's with an additional filter of **Status** = *Fixed* to achieve the results we would like to see. This selection process may result in a report something like:

Customers and their Issues			Refresh Gro	oup Issues	Update Issues	Return	Print Page
Ises Hierarchical	Reporting					Reco	rds 1 to 6 of
Business Area =	Customer Issues						
Prepared by Bill S	mith on 6/12/07 3:06 PM	Ē.					
Customer	Customer Contact	Phone Number	Customer Email	Cnt			
Coca-Cola	Wilson	(232)323-2323	wilson@wwww.co	om 2			
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	n 5			
Evian	George Jones	(222)222-2222		1			
NTT	Suzuki	(232)323-2323	s@ntt.com	1			
Hewlett Packard	Chris Black	(232)323-2323		2			
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	6			
						Reco	rds 1 to 6 of
			Refresh Gro	oup Issues	Update Issues	Return	Print Page

Aggregate report showing count of Fixed issues

The complete list of aggregate functions you can use is:

Function	Purpose
Count	This will count the number of child records within each parent record that match the selection filters
Sum	This will sum the total of the numeric value of the child records within each parent record that match the selection filters
Min	This will show the minimum numeric value of the child records within each parent record that match the selection filters
Max	This will show the maximum numeric value of the child records within each parent record that match the selection filters
Mean	This will show the mean of the numeric values of the child records within each parent record that match the selection filters

Personal & Public Reports

Personal Reports

These are reports or charts that you have prepared and saved for your personal use. Other users may not access these.

Public Reports

These are reports or charts that you or someone else has prepared for use across individual user roles or for everyone's use. Your administrator must give you permission to create and save public reports.

Role-Based Reports

These are reports or chanrts that may be shared across all the users of a user role. Your administrator must give you permission to create and save public reports.

Shared Reports

These are reports or charts that you may share arbitrarily, with any users that you nominate. With permission, you can create and maintain groups of users that you may share reports with.

Report Organization

Reports are organized within the Personal Reports and the Public Reports folders that you see on the Query screen. Within both the Personal Reports and the Public Reports sections, you can create sub-folders to keep reports of a similar nature organizaed. Sub-folders may contain other sub-folders.

You can manage the folders by clicking on the **Manage Report Folders** button. If you do not have any folders to manage, then this button will not appear. This displays a screen similar to the following:

	dit button by the folder name in the folder tree. Use the Delete button empty. To create a new report folder, click on the folder that is to be its
eate a new folder under: My Reports	
Folder name	
Sort sequence	
Create new folder	52.
Ider Tree	
Edit Folder with all reports that prepare PDF's	
Public Reports	
Edit Bug Reports	
Edit Knowledge Base Reports	
- Edit Customer Issue Reports	
Edit Customer issues sub folder	
Edit Customer issues sub-sub folder	
Edit Helpdesk Reports	
Edit Delete Feature Request Reports	
– Edit General Reports	
Edit Test Plan Reports	
Edit Dashboard Reports	
Edit SLA Reports	
Return	

Folders can be created at any point in the tree by clicking on the place in the tree where you want to create the new folder, then entering a new folder name, followed by clicking on the **Update** button. The **Edit** button allows you to rename any report folder. Note that the **Delete** button only appears by a report folder that does not contain any reports. If you want to delete a report folder that contains reports, you must either move the reports to a different location, or delete them first.

Report Types

There are several actions that can be taken from the Report screen to create and maintain different types of reports. You select the action for the report type from the select list and press the **Go** button.

Admin Reports

Typically, only users with the Administration role are given access to these reports. For the current release there is only a single admin report, but in the future this list will be expanded. The key reason why these reports appear outside of the administration screens is in order to be able to use the Report Scheduler to provide an automated means to deliver the reports. Like all other reports, you should create the report, save it, then edit it to create a schedule.

User Sign On Log

The User Sign On log can also be accessed from the Administration utility of the same name. It is provided as a true report, in order that users may use the report scheduler to run and automatically distribute the report. When the user clicks on the report entry to create a **New Admin Report**, the following report editor screen appears:

Run Report Save	Report Save As Delete Report Clear All Cancel Print Page	ExtraView Admin Report
Admin Report O	ptions	
Report title		
Description		
Browser	~	
Report Selection	n	
Report Type ?	User Sign On Log 🗸	
Sort Column ?	Timestamp+	
Report Filters		
Sign On/Sign Off	* None * 🗸	
Start Date		
End Date		
Result		
Failure Reason		
User ID		
IP Address		
Concurrent Users		

Usage is straightforward.

- The report type is User Sign On Log. You may select the sort order of the output with the Sort Column option
- The report may be output to the browser, text, Microsoft Word or Adobe PDF
- You may schedule the report through the **Schedule Report** button, once the report has been saved.

If you do not select any filters, the entire user sign on log will be produced. You may select a subset of the log using the filters provided.

- You can use **\$\$SYSDATE\$\$** and **\$\$SYSDAY\$\$** tokens in the **Start Date** and **End Date** fields. You can also specify simple arithmetic. For example, set the **Start Date** to **\$\$SYSDATE\$\$-30** and the **End Date** to **\$\$SYSDATE\$\$** to obtain the log for the last 30 days
- Both the **Concurrent Users** and **Guest Users** columns have the ability to filter using greater than and less than math. For example, enter >10 in the **Concurrent Users** column to see a log of all the times when more than 10 concurrent users were signed on

The output from the log will be similar to the following:

User Sign On L	po						
Use the date filters	to set boundaries for all the sign of columns allow you to specify great			sults using the selectors at	the top of the grid. Filters in th	e Concurrent Users	
Filters							
Sele	ct filter type * None * Apply Filter	✓ Start date			End date	I	
Autosize columns	Export to CSV						
Sign On/Sign Off	Timestamp	Result	Failure Reason	User ID	IP Address	Concurrent Users	Guest Users
* Filter *		Failed to sign or \vee	Incorrect Passw 🗸	* Search *	* Search *		
SIGNON	2017-07-20 08:38:03.655 -0700		Success	Denise Hendsbee	71.198.221.239	26	3
IGNON	2017-07-20 08:47:13.105 -0700		Success	LeeAnn Pultz	71.80.242.134	30	3
GIGNON	2017-07-20 08:50:22.533 -0700		Success	Denise Hendsbee	172.16.100.2	31	3
SIGNON	2017-07-20 08:50:38.995 -0700		Success	LeeAnn Pultz	71.80.242.134	29	3
SIGNON	2017-07-20 08:54:21.309 -0700		Success	Gregor McPherson	142.134.150.72	32	3
SIGNON	2017-07-20 08:55:36.331 -0700		Success	Hsing-Hua Wang	76.121.53.33	32	3
SIGNON	2017-07-20 09:05:38.557 -0700		Success	Allan Rofer	73.189.24.164	33	3
SIGNON	2017-07-20 09:05:50.839 -0700		Success	Dan Bibbey	192.146.101.24	33	4
SIGNON	2017-07-20 09:06:34.471 -0700		Success	LeeAnn Pultz	71.80.242.134	34	4
SIGNON	2017-07-20 09:18:10.499 -0700		Success	Carl Koppel	71.198.90.231	33	4
SIGNON	2017-07-20 09:24:23.732 -0700		Success	Carl Koppel	71.198.90.231	34	5
SIGNON	2017-07-20 10:06:51.282 -0700		Success	Carl Koppel	71.198.90.231	36	3
SIGNON	2017-07-20 10:07:45.608 -0700		Success	Carl Koppel	71.198.90.231	37	4
SIGNON	2017-07-20 10:18:13.864 -0700		Success	Ali Goksel	73.241.8.69	41	4
SIGNON	2017-07-20 10:18:20.419 -0700		Success	Carl Koppel	71.198.90.231	42	4
SIGNON	2017-07-20 10:21:49.405 -0700		Success	Gregor McPherson	142.134.150.72	38	4
				LeeAnn Pultz	71.80.242.134	38	4

Aging Reports

If you choose the **Create new aging report** from the Query / Reports screen offers a variety of aging reports, designed to show how long issues have remained in various statuses as the issues were progressed from stage to stage. The aging report produces a count of issues that have been in each status for a defined period of time. These reports are offered at multiple levels as discussed below. When you select this option, you will see the following screen:

un Report Save I	Report Save As Del	ete Report Clear All Cancel P	rint Page	ExtraView Aging Report
ging Report Op	tions			
eport title				
escription				
Browser	~		Output Rep	port Definition 👔 🗌
elect Status valu	ues to display on re	eport, and select the options	to age the values	
* Any *		Select th	e number of columns to disp	play on the aging report $5 \sim$
* None *		Select the time interval (ho	ours or days) to count for ea	ch column of the report $7 \sim$
New Not Yet Tested				
[<u>199</u>		Select the time units for ea	ch column of the report Days 🗸
etailed Display (Output - Selections	s one Status and a Time Inter	rval to only display agin	g detail
* Select a Statu	us * 🗸		* Select an	interval * 🗸
uery Filters	O Standard	O Condensed Filters	* Saved Filter List * 🗸	Use Allowed Values in Filters ?
	Advanced	Expanded Filters	Save / Update Filters ?	
	Select Field		(Operator Value
=	Priority(PRIORITY)		~][equals 🗸 Any *
and v	Status(STATUS)			* Ask at runtime * * None * P 1 P 2 not in V Open Fixed Closed Duplicate Not Found

Creating an aging report

The Aging Report options are the same as for Column and Summary reports. Likewise, selecting filters is the same as for other report types. The specific information required for aging reports is collected in the center sections of the report editor.

Select Status values to display on report, and select the options to age the values

This section sets up the report output, providing a summary report with the details available as drilldowns from the output.

Status List	This presents all the statuses available, and you may select the statuses you want to display on the aging report, when you run the report
Select the number of columns to display on the aging report	This option allows you to decide how many columns you want to display on your aging report. The default is five columns, but you can choose any number from one to one hundred
Select the time interval (hours or days) to count for each column of the report	This sets how long each period of the aging report is. For example, if you select the default value (seven) you are choosing either seven hours or seven days for the aging period, as further defined by the next option. The maximum for this selection is thirty-one, allowing for a breakdown by days over one complete month
Select the time units for each column of the	In conjunction with the time interval, this selects whether you are aging the information in either hours or days. The default value of days, used with the

report other default options, results in an aging report with five columns, each representing one week in time

There is a button to the right of the **Report Title** that appears when you are editing an existing report. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful for managing public reports. When you have selected the options and pressed the button to run the report, the output will look similar to the following:

				Tested - Failed; Clo	sed; Duplicate; Not F		
Prepared by Bill Sm	hith on May 8, 201	7 3:29:41 PM PD	Γ				
Status	0 - 7 DAYS	7 - 14 DAYS	14 - 21 DAYS	21 - 28 DAYS	> 28 DAYS		
New	25	0	1	4	257		
Not Yet Tested	0	0	0	0	0		
Tested - Passed	1	0	0	0	0		
Tested - Failed	0	0	0	0	0		
Open	11	3	1	0	75		
Fixed	2	0	0	0	145		
Closed	7	0	0	0	10		
Duplicate	0	0	0	0	5		
Not Found	0	0	0	0	2		
* None *	1	0	0	0	30		
Total	47	3	2	4	524		

Aging report display

As you can see from the sample, the report displays each of the statuses selected, along with a count of the number of issues that have been in that status for the different time intervals on the report. Each of the counts is a link to the issues that make up the count. Clicking on the number drills down to a further report that gives a history of the time the individual issues spent in each status as shown in the following diagram. Note that incomplete days are not counted in the aging. Similarly, if your report is based on an hourly drilldown, then incomplete hours are not counted.

Refresh Return Print Page				Aging Re	port Detail (
					Aging Report Det
Prepared by Bill Smith on May 8, 2017 3:32:14	4 PM PDT				
ID # Title		Status	Assigned To	Timestamp	Time in Status
10218 The GUI has a problem when you enter	r the status of the issue	New	Chris Robinson	Jan 25, 2005	0 days
		Open	Chris Robinson	Jan 25, 2005	9 days
		Fixed	Bill Smith	Feb 3, 2005	0 days
		Fixed	Bill Smith	Feb 3, 2005	
10263 <bill's be="" equipment="" list="" reviewed="" to=""></bill's>		New		Mar 16, 2005	25 days
		Open	Jimmy Duncan	Apr 10, 2005	8 days
		Fixed	Jimmy Duncan	Apr 19, 2005	0 days
		Fixed	Jimmy Duncan	Apr 19, 2005	
10063 Metal mounting bracket is too short		New	Jimmy Duncan	Jun 30, 2004	0 days
		UNASSIGNED	Jimmy Duncan	Jun 30, 2004	1,002 days
		Open	Bill Smith	Mar 29, 2007	7 days
		Fixed	Bill Smith	Apr 6, 2007	0 days
		Fixed	Bill Smith	Apr 6, 2007	
Displaying 3 rows					
Refresh Return Print Page					

Drilling down into an aging report

From this report, you can drill down again, by clicking on the issue ID #. This results in the Detailed Report for the issue being displayed.

Detailed Display Output - Select one Status and a Time Interval to only display aging detail

It is optional to select entries in this section of the report editor. If you do, then the summary output is skipped and you are provided with the above screenshot, for the Status and Time Interval you select.

Calendar Reports

Calendar reports are named as their output is presented in a traditional calendar format. All calendar reports rely on choosing a date on which an event happens. The date may be, for example, the due date of an activity or task, or may be a date such as the date a group of issues were created.

When there is an activity or event displayed on a calendar report, you will see metadata associated with the event on the report, and additional information when you hold your mouse over the event. Double-clicking on the event will pop up an *Edit* window for the event. Double-clicking on an empty spot on the calendar will allow you to create a new event (or issue). Assuming you have permission to alter the date that is being displayed on a report, then you can drag the event to a new place on the calendar. Doing so automatically updates the underlying issue. You may take an existing event and create recurrences of the event. For example, you might have an inspection that is due each Tuesday morning at 10:00 a.m. You create the first inspection event, then use the recurrence to create additional events at the same time on

each successive week. Any one issue or event may be set up to recur a maximum of 366 times.

Once displayed, the calendar report contains many views - daily, weekly, the work week, monthly and an agenda view. Of special interest is that you may overlay many calendar reports on top of each other. This allows you to create many filtered views of events using different dates within your system, or events with different filters. These can then all be displayed on the one calendar report screen, using color to differentiate between the different sets of results. It is simple to navigate to different dates and date ranges.

A key point is to recognize how dates with a field display type of **date** and **day** are treated. **Date** type fields are placed on the calendar output at the precise time during the day that they occur. **Day** type fields have no time component and they are always placed at the top of the calendar report, at midnight of the day on which the event occurs.

Creating a Calendar Report

From the Query screen, choose the Create new calendar report option. You will see this screen:

Run Report Save Report Save A	As Clear All Cancel Print Pa	ige		ExtraView Calendar Report 🤋
Calendar Report Options				
Report title				
Description				
Output to Browser 🗸		Ou	tput Report Definition <mark>?</mark> 🗆	
* Select Reporting Hierarchy *				
Select Fields to Form Calendar	Report			
Ise a date field	d at a single point in time 🛛 💽 l	Use a time span between two date fi	elds	
Date / Time ? * None *	~	View ? Week ~	Collapse Toolbar 👔 🔲	
Select Fields to Display on Cale	endar Title and Calendar Pop	oup Description		
-	Title Fields ?		Description Fi	elds ?
Find a field	Show field name	Find a fiel	d	□ Show field names
2nd Fold title	^	2nd Fold t	itle ^	
Abstract Actual Renewal Date		Abstract	newal Date	
Actual Renewal Date Actual Time (hrs)		Actual Re		
Address		Address		
Application		Applicatio	n	
Approved by		Approved	by	
Asset Type		Asset Typ		
Asset details		Asset det		
Assigned To		Assigned		
Automated Building		Automate	0	
Bus Priority		Bus Prior	ity Y	
Query Filters	Standard O Co	ondensed Filters	* Saved filter list *	~
۲		kpanded Filters		
			Save / Update Filters ?	
Select Field		Operator Value		
Select *		~		

Calendar Editor

- The Report title and the Description are required before you can save the report you create.
- Calendar reports may only be output to the browser. They cannot be output to other destinations such as Microsoft Office documents or to Adobe Acrobat PDF formats
- Items displayed on Calendar reports are based on either a single date field or on two fields. If you select the option **Use a date field at a single point in time** then the calendar will display items at the date and time of the value of the field you select. If you select to **Use a time span between two date fields** then there will be two date fields used where you enter the starting date and time of the event

in the first field and the ending date and time of the event in the second date field. Only date fields will appear in the lists offered. If the field you select has a display type of *day* then it does not have a time component, and the event will be displayed at midnight of the value of the event. If the field you select has a display type of *date* then the event is displayed at the time during the day of the event. Note that items created at a single point in time are actually displayed as one hour-long events. This is simply for display purposes. This has one effect that is worth noting. If an item at a point in time is created closer than one hour to midnight, then the event will only appear in the same day. It will not appear into the next day.

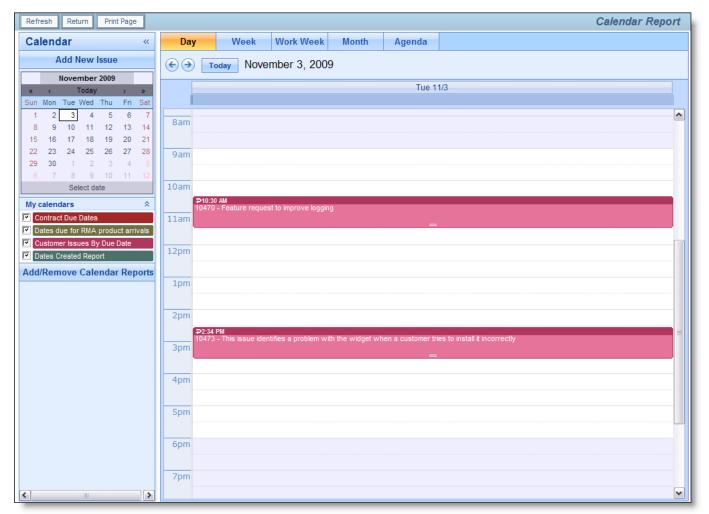
Select Fields to Form Calendar Report	
C	
Date / Time @ * None * View @ W	Veek 💽 Collapse Toolbar 🛞 🗖
Select Fields to Display on Calendar Title and Calendar Popup Description	
Title Fields @ Description Fields @	and the second s

Choosing dates for calendar reports

- The **View** option allows you to initialize the calendar report in either a daily, weekly, work week, monthly or agenda view
- If you check the box to **Collapse Toolbar** then the toolbar on the output is not displayed when the report is first created
- The **Title Fields** are going to be displayed on the calendar, at the top of the event. It is recommended that you select the ID and Title of the item to be displayed
- The **Description Fields** are those that will appear in a window that pops up on the report output when you hover your mouse over an item. You may place any fields here, but it is recommended not to choose more than a handful of fields
- There is a button to the right of the **Report Title** that appears when you are editing an existing report. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful for managing public reports.

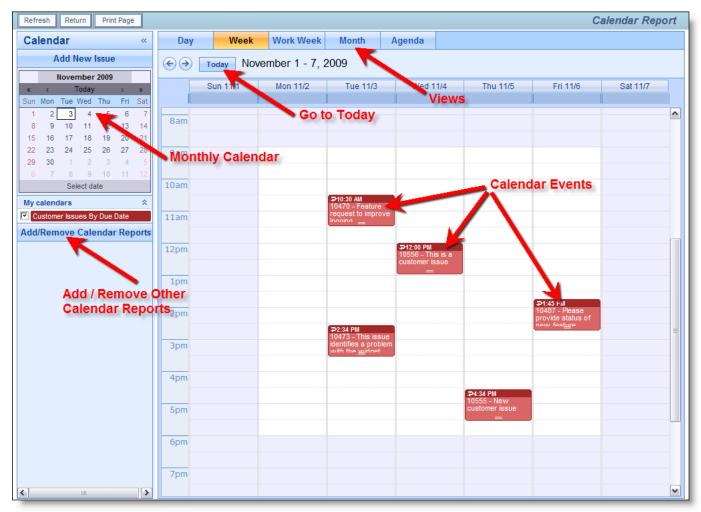
Viewing the Output

Click on the **Day** button to see the daily view.



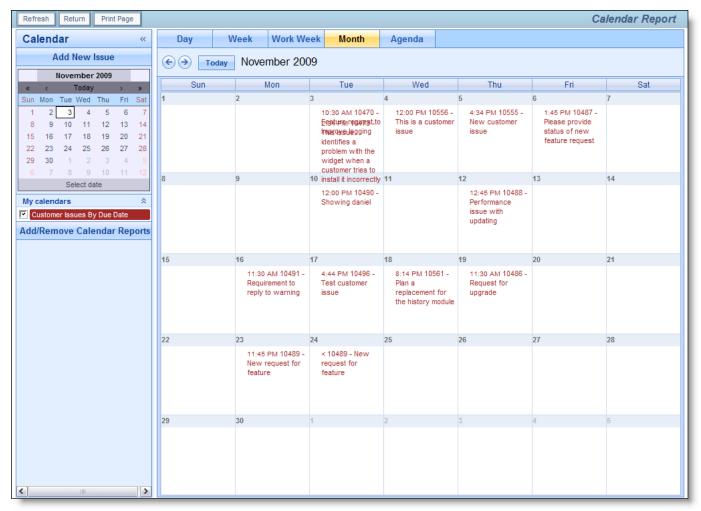
Calendar Daily View

Click on the **Week** button to see the weekly view. Note there is also a **Work Week** view which will only display Monday through Friday.



Calendar Weekly View

Click on the Month button to see the monthly view.



Calendar Monthly View

Click on the Agenda button to see the agenda view. This displays all the results in time-sequence.

Refresh Return Print Page					Calendar Report
Calendar «	Day	Week	Work W	/eek Month	Agenda
Add New Issue	Sunday, No	ovember 8	3, 2009		
November 2009 « < Today > »	Monday	Nov 9	3:44 PM	10490 -	
Sun Mon Tue Wed Thu Fri Sat 1 2 3 4 5 6 7	wonday	1107 3	3.44 F M	Showing daniel	
8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5	Thursday	Nov 12	12:45 PM	10488 - Performance issue with updating	
6 7 8 9 10 11 12 Select date My calendars	Monday	Nov 16	11:30 AM	10491 - Requirement to reply to warning	
Add/Remove Calendar Reports	Tuesday	Nov 17	4:44 PM	10496 - Test customer issue	
	Thursday	Nov 19	11:30 AM	10486 - Request for upgrade	
	Monday	Nov 23	11:45 PM	10489 - New request for feature	
	Tuesday	Nov 24	•	10489 - New request for feature	
<	<				

Calendar Agenda View

If you place your mouse over an event on the calendar, a popup appears displaying the fields selected in both the title and description field lists in the report editor.

 P10:30 AM 10470 - Feature request to improve logging =	
10470 - Feature request to improve logging	<u>.</u>
Tuesday, November 3, 10:30 AM - 11:29 AM	
 Description:	h.
 The customer requests improved error messages in the EVJ.log file (and possibly any other logging functions available to the Administrators for troubleshooting) for cases when the user fails to authenticate to ExtraView with LDAP credentials.	
Priority: P 3	2
Product: Tracker	1
Status: Fixed	
 A have the second second and the second s	

Calendar Popup

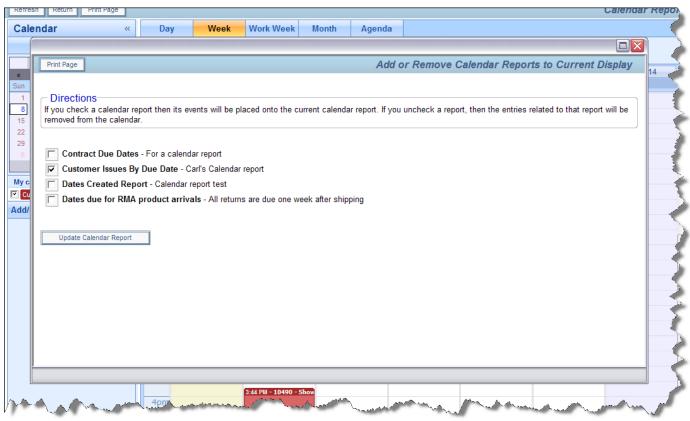
Manipulating Issues on the Calendar Output

You can both update events directly on the calendar report as well as add new events. In addition you can alter the time or duration of the event by dragging it to a new location on the calendar.

- Adding an event: Double-click on the background of the calendar and an *add* screen will open, allowing you to add a new issue (event) to the database. The *add* screen that appears will be that of your current Business Area and Project. Note that no verification screen appears after adding a new issue via the Calendar report
- Updating an event: Double-click on an event on the calendar, and you will open up the event (issue) in an *edit* window. Make any changes to the underlying issue and then update the issue in the normal way
- Moving an event: Click on an event and drag it with your mouse to a new location on the calendar. The date field upon which the event is based is updated when you drop the event at its new date and time. Note that if the field is read-only, or is one of ExtraView's built in fields (such as the *Date Created* or the *Date Last Updated* then you will not have permission to drag-and-drop the event to a new date and time
- Extending the duration of an event: This is only applicable to events that cover a time span, i.e. they have a beginning start date and time and an ending date and time. You may move the event, in the same fashion as the previous bullet, or you can extend or reduce the duration of the event by using the anchor point at the bottom of the event. You can click on this and drag the end point of the event to the new date and time.

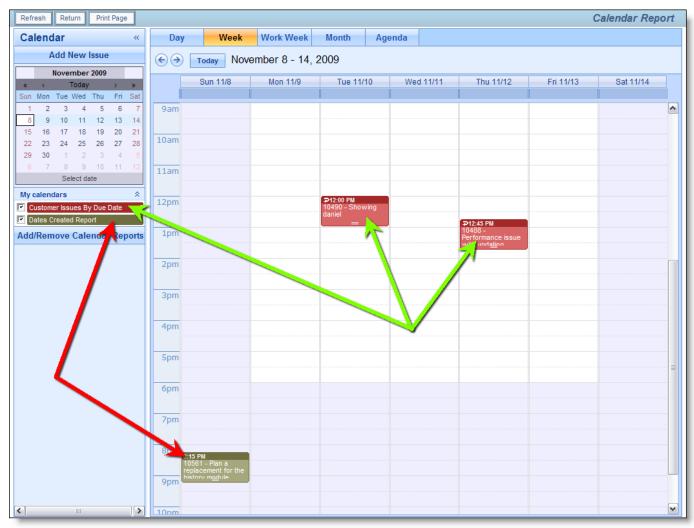
Adding Additional Calendar Reports to the Current Report

A useful attribute of the calendar is the ability to many calendar reports onto the same report output. The results of each additional query after is selected via the **Add/Remove Calendar Reports** button after displaying the first calendar. When you press the button, you will see a screen similar to:



Adding Additional Calendars to the Report

Simply check the reports you want to add into the existing report output. Up to 24 calendars can be added



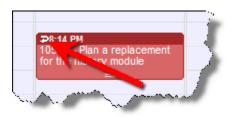
into the one report. This image shows two calendar reports displayed together:

Multiple Calendars on a Single Report

If any of the calendar reports that have been added to the output have runtime filters, then an icon appears beside the report title at the left-hand side of the screen. Clicking this icon allows the runtime filters for the report to be altered.

Recurring Events

Recurring events may be created from any calendar event where there is write permission to the date field(s) upon which the report is based. For example, you cannot create a recurrence on a report based on the **date created** field as this is system maintained, but you may create a recurrence from a calendar report that is based on a user defined field to which the user has write permission. The ability to create a recurrence is indicated by a small arrow at the top left-hand corner of the calendar event as shown here:



Click here to enter the recurrence for an issue

When you click on the arrow, a window dialog box pops up, allowing you to create various types of recurrence:

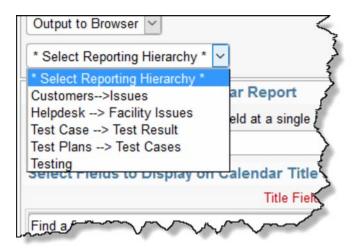
issues are created	ue Directions you to take the current issue as children of the issue you attern using this form.	e and copy it to other issue have selected. You can cre	s at different points in tim eate recurring issues with	e. The recurring a daily, weekly,
Recurrence patter	n			
Daily 🗸	Every 1 day(s) 1 time	e(s)		
	Every 1	day(s)		
Range of recurren Starting: 11/18/09 8				
	Recur 1	time(s)		
		Update		

Creating a recurrence for an issue

Issues can be made to recur on a daily, weekly, monthly or yearly basis. For any choice of the period, the popup dialog box alters to allow you to set up the recurrence. For each recurrence, a new issue is cloned from the original at the appropriate day and time. You can set up any issue to recur a maximum of 366 times. Once the issues have been created, they work independently when a user updates each issue, although you can alter the recurrence, or sever an issue from the recurrence.

Hierarchical Calendar Reports

If your administrator has defined hierarchies on which you can report, you will see an additional prompt on the report editor screen:



Reporting on hierarchies within calendar reports is similar to the way they are defined for column reports (See the section on Column reports for a full explanation). The key difference is that you are only required to select the filters for each level in the hierarchy. These filters will be applied to each level of the hierarchy for the preparation of the data to be placed on the report. The report output will look very similar to a standard summary report, except that the additional filters are applied.

Charts

Selecting the **Create new chart** option from the Query / Report screen allows you to create charts of various types. Pie charts, bar charts, stacked bar, area charts and line charts can be built and displayed. Each chart you create may have filters that allow you to select what data is represented.

Note: The font used on the display of charts you prepare is set as a personal option. You can edit your personal options and choose the font you wish to use for the charts you prepare.

All charts are generated as of a specific point in time. For example, you can draw a pie chart of the status of issues within a product, as of one month ago, or you can draw a bar chart of open issues as they stood at the beginning of each month for the last year. These charts may have query filters set. For example, you may draw the chart for a specific product. The specific product used for the preparation of the chart will be the one currently stored within the issue. If this product changed within the history of the issue, the chart will not reflect this, and will report as if the issue always reported the same product. In most cases, this is sufficiently accurate, as fields outside of status that are used in the selection of filter criteria do not typically change often, if at all.

Care should be taken when selecting the filters to use for a chart, after selecting the field or fields which you are going to use for the chart itself. This matters if you choose the same field as a filter and for the chart. You might generate a chart that does not have the values you expect, by filtering out all the values.

Note: Depending on how your administrator has configured any field you select in the **Select field to chart** entry, may or may not be required when you are entering and updating issues. This is represented by the * **None** * value you see in the list. You may not want your charts to contain the * **None** * value. ExtraView will only place the * **None** * value on your chart if you explicitly include this in your list. If you choose the * **Any** * value, you will not see the * **None** * entry on your chart. There is a button to the right of the Report Title that appears when you are editing an existing chart. When you place your mouse over this button, you will see who created the chart, who last updated the chart and the dates when these actions occured. This is most useful for managing public reports.

Common Chart Attributes and Filters

Most attributes are common across all chart types that you can create. However, some attributes do not appear on all report types as they have no context.

- Chart Attributes
 - You may choose a **reporting hierarchy**. If you do, you will be able to set report filters for each level of the hierarchy. Reporting on hierarchies within charts is similar to the way they are defined for column reports. The key difference is that you are only required to select the filters for each level in the hierarchy. These filters will be applied to each level of the hierarchy for the preparation of the data to be placed on the chart. The chart output will look very similar to the standard chart you are preparing, except that the additional filters are applied
 - There is an option to display the chart on mobile devices
 - There is an option to output the chart fields and filters **definition** along with the chart
 - Choose the presentation options for the chart **2D or 3D**, whether to display a legend, whether to show the percentages for each slice of the pie, whether to display the labels, and whether to display the values for each slice
 - If you have chosen to create a chart with a time series on the X axis, then there will be an option to select the **Date format** for the labels on the chart. The default will be your own date format, but you may choose a different format. The key use of this is to shorten the length of the labels on the charts you create.
 - If you check the box **Display legend separately** then the legend for the chart will not be rendered within the chart, but will be rendered to the right of the chart, in a separate area. This is useful if you have very long labels on the chart, and they overflow the size of the chart area
 - If you check the box **Display table of results**, a table with the numeric results will accompany the chart output. For each data point on the chart, you will see its value in a table on the same page as the report
 - For many chart types you can add a **drilldown link**. When the user clicks on the segment of the chart, a Quicklist is prepared with the issues that formed the chart segment
 - $\circ\,$ Value-based charts with field names on the X axis have an option to display the titles horizontally, vertically or at a 45° slant
 - Also selectable is the overall **width** and **height** of the chart. You are limited to charts that are a minimum of 100 pixels in width and height and a maximum of 1,600 pixels in width and height
 - For pie charts, you can explode a slice of the chart
 - There is an option to display the table of results along with the chart
 - You can select a **color scheme** for the chart or design your own by choosing the Custom option
 - Alter the color of the plot area and the background color for the chart with the options provided. You can either type in a hexadecimal color value, or click on the color picker button to select a color from a palette

Color Picker	×
	OK Cancel
	#FFFFFF
	Green: 255
Red: K <	Blue: 255
Green: K K	KC
Blue: K	KK

Color Picker

- Chart Filters
 - You should not set a field as a filter if you have selected the same field as the **Select field to chart**. Doing so will lead to incorrect results being displayed
 - Select the filters for the report. Like other report types, you can move between the standard query filters, and the advanced query filters, using the radio buttons at the top of the screen.

After choosing the pie chart option a typical report editor screen looks like this:

Create Chart Save Report Save As Clear All Cancel Print Page	ExtraView Charts ?
Chart Options	
Chart title	
Description	
	Display on Mobile 👔 🗆
Output to Browser	Output Report Definition ?
Select chart type ? Select field to chart	Select values to chart Report Date 👔
Pie chart V Status(STATUS)	× None * •
	* Select All *
	New Not Yet Tested
	Tested - Passed
	Tested - Failed Open
	Fixed
	Closed Duplicate
Chart Attributes	
2D or 3D	Color scheme Pastel colors
Legend O On O Off	Selected colors
Percent O On Off Label On Off	
Values O On O Off	Plot area color #FFFFF
Display legend separately	
Display table of results	
Image width 650	Background color #FFFFF E
Image height 450	
Pie slice to explode ? * Select a Value * v	
Query Filters O Standard * Saved filter list *	~
Advanced Save / Update Filters ?	Use Allowed Values in Filters ?
Select Field	Operator Value
Select *	~
Create Chart Save Report Save As Clear All Cancel Print Page	

Charts with Repeating Rows

There is currently a restriction on multi-valued fields within charting. Only one of the values for a time interval will be reported.

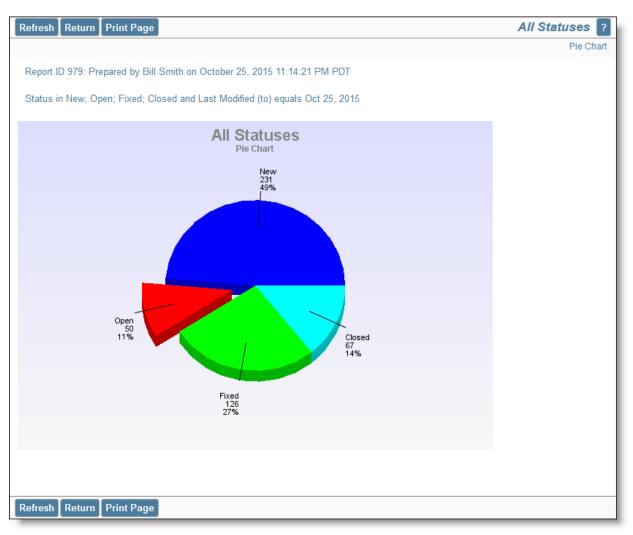
Pie Charts

Pie charts are all produced at a point in time, as specified by the date you select within the Report Date field.

You simply select the enumerated field you wish to place on the chart, and select the values within the field that you wish to place on the report.

One option for pie charts is to explode a slice of the pie. Select the value of the field you are plotting for this operation.

A sample pie chart is as follows:



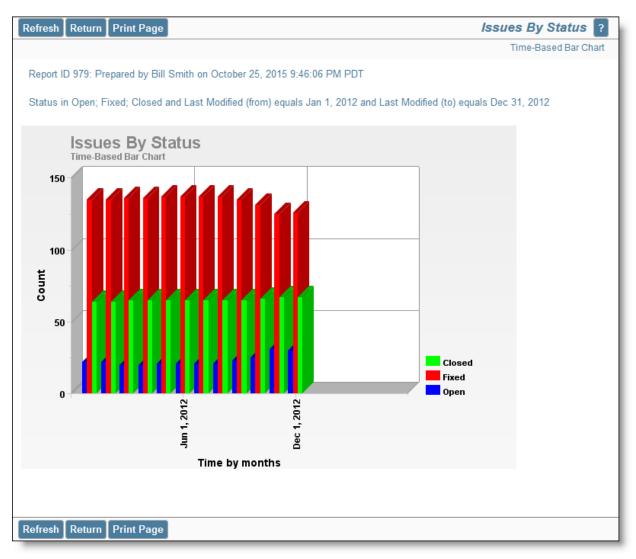
Bar Charts

Time-Based Bar Charts

Choose the **time-based bar chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select the field to chart. The list presents all the potential enumerated list fields which are eligible for the chart type
- From the field you select, you can choose one, multiple or all the values within the field
- Select the Start and End dates. Note you can choose \$\$SYSDAY\$\$ to represent the current day, and you can perform simple arithmetic on the date. For example, \$\$SYSDAY\$\$ 30 represents 30 days ago
- Choose the increment for the X axis, from days, weeks months and years
- Cumulative results include every item that matched criteria during the time period you selected. If this box is not checked then only the items that first transitioned to match criteria in the given time period are used to calculate the values displayed on the chart.

A sample time-based bar chart looks like this:



Value-Based Bar Charts

Choose the **value-based bar chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select one or two fields to chart. The lists presents all the potential enumerated list fields which are eligible for the value-based are chart type
- The current point in time is used to draw the chart
- If you want to use only some of the values within the field(s) you selected, set a filter for the field, and select the values you want to display on the chart output

A sample value-based bar chart looks like this:



Stacked Bar Charts

Time-Based Stacked Bar Charts

Choose the **time-based stacked bar chart** type from the chart selection list. Complete the remainder of the form as follows:

• Select the field to chart. The list presents all the potential enumerated list fields which are eligible

for the chart type

- From the field you select, you can choose multiple values within the field. Each value becomes a different segment of the stacked bars
- Select the Start and End dates. Note you can choose \$\$SYSDAY\$\$ to represent the current day, and you can perform simple arithmetic on the date. For example, \$\$SYSDAY\$\$ 30 represents 30 days ago
- Choose the increment for the X axis, from days, weeks months and years
- Cumulative results include every item that matched criteria during the time period you selected. If this box is not checked then only the items that first transitioned to match criteria in the given time period are used to calculate the values displayed on the chart.

A sample time-based stacked bar chart looks like this:



Value-Based Stacked Bar Charts

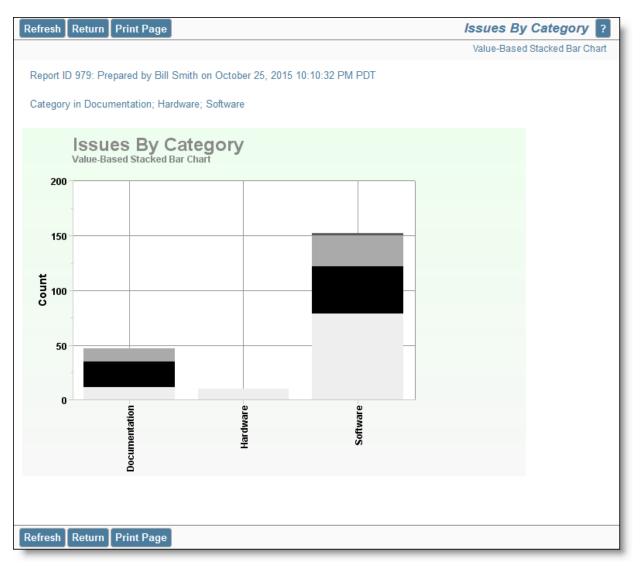
Choose the **value-based stacked bar chart** type from the chart selection list. Complete the remainder of the form as follows:

• Select one or two fields to chart. The lists presents all the potential enumerated list fields which are

eligible for the value-based are chart type

- The current point in time is used to draw the chart
- If you want to use only some of the values within the field(s) you selected, set a filter for the field, and select the values you want to display on the chart output

A sample value-based stacked bar chart looks like this:



Line Charts

Time-Based Line Charts

Choose the **time-based line chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select the field to chart. The list presents all the potential enumerated list fields which are eligible for the chart type
- From the field you select, you can choose one, multiple or all the values within the field

- Select the Start and End dates. Note you can choose \$\$SYSDAY\$\$ to represent the current day, and you can perform simple arithmetic on the date. For example, \$\$SYSDAY\$\$ - 30 represents 30 days ago
- Choose the increment for the X axis, from days, weeks months and years
- Cumulative results include every item that matched criteria during the time period you selected. If this box is not checked then only the items that first transitioned to match criteria in the given time period are used to calculate the values displayed on the chart.

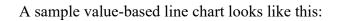
A sample time-based line chart looks like this:

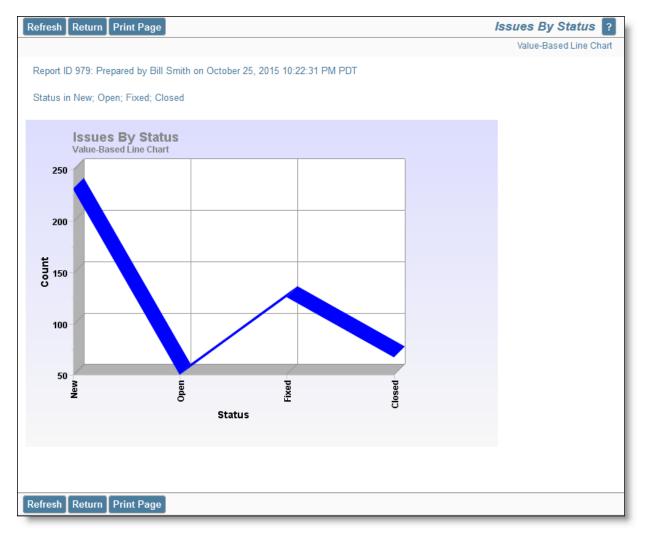


Value-Based Line Charts

Choose the **value-based line chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select one or two fields to chart. The lists presents all the potential enumerated list fields which are eligible for the value-based are chart type
- The current point in time is used to draw the chart
- If you want to use only some of the values within the field(s) you selected, set a filter for the field, and select the values you want to display on the chart output





Area Charts

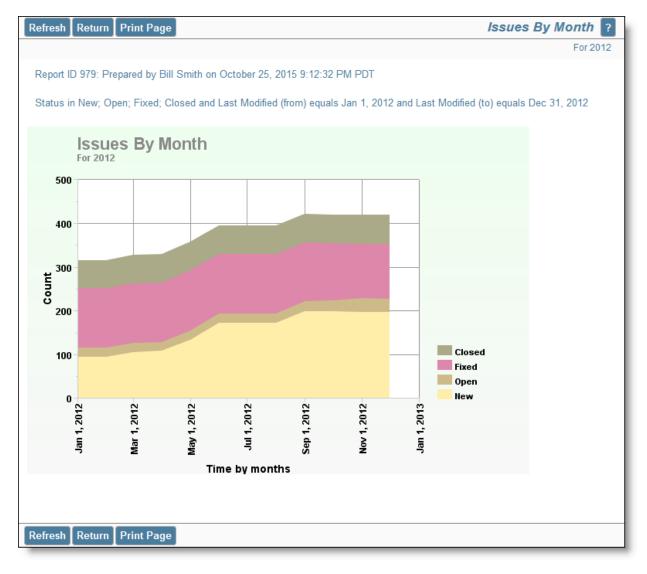
Time-Based Area Charts

Choose the **time-based area chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select the field to chart. The list presents all the potential enumerated list fields which are eligible for the chart type
- From the field you select, you can choose one, multiple or all the values within the field
- Select the Start and End dates. Note you can choose \$\$SYSDAY\$\$ to represent the current day, and you can perform simple arithmetic on the date. For example, \$\$SYSDAY\$\$ 30 represents 30 days ago
- Choose the increment for the X axis, from days, weeks months and years
- Cumulative results include every item that matched criteria during the time period you selected. If this box is not checked then only the items that first transitioned to match criteria in the given time

period are used to calculate the values displayed on the chart.

A sample time-based area chart looks like this:

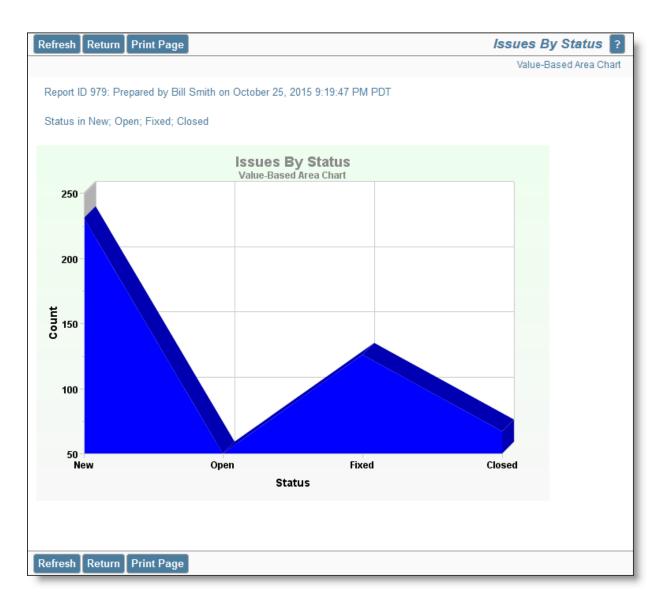


Value-Based Area Charts

Choose the **value-based area chart** type from the chart selection list. Complete the remainder of the form as follows:

- Select one or two fields to chart. The lists presents all the potential enumerated list fields which are eligible for the value-based are chart type
- The current point in time is used to draw the chart
- If you want to use only some of the values within the field(s) you selected, set a filter for the field, and select the values you want to display on the chart output

A sample value-based area chart looks like this:



Pareto Charts

Pareto charts plot a single enumerated list field, providing a count of the number of issues within each value, from high to low. You can select the maximum number of values to plot before lumping the rest of the values in an Other category.

A sample pareto chart display looks like the following:

(D	5	10	15	20
Jimmy Duncan-					18.85
Bill Smith				17.49	_
George Miller-				16.12	_
Susan Green			11.2		_
Chris Robinson			10.66		_
Mary Brown			9.84		_
Greg Goldberg		6.01			_
Mary Dickens		4.64			_
Sally Hunt	2.46				_
太郎日本一	1.37				-
SCM Daemon	0.82				_
John Customer	0.27				-
Frank Gallagher	0.27				-
Frank Gallagher	0.27				-

Control Charts

Control Charts - cCharts

Control charts (cCharts) are viewed as one of the *Seven Basic Tools of Quality* (Reference - Montgomery, Douglas (2005). Introduction to Statistical Quality Control. Hoboken New Jersey: John Wiley & Sons, Inc.). Control charts are used to help identify if business and/or manufacturing processes are currently under control, and to also predict future performance. If the process if out of control, the chart can be used to help identify areas that require further analysis.

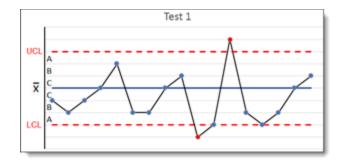
The ExtraView documentation is not intended as a thorough treatise on the use and interpretation of control charts. The user is expected to be familiar with the concepts and to understand the topic.

A control chart renders 3 horizontal lines which indicate the Upper Control Limit (UCL), the Lower Control Limit (LCL) and the Mean (\bar{x}). The UCL is +3 σ from the Mean line and the LCL is -3 σ from the Mean line.

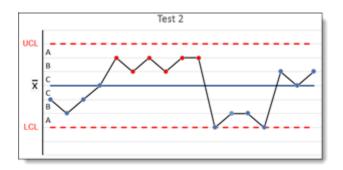
Visible indicators are used to identify data points that signal areas of concern. Points on the chart that are deemed to be behaving in an unusual way are referred to as *Special Cause* points. These points are colored red.

There are up to 8 tests that can be used to identify *Special Cause* points. Any combination of tests can be selected and any integer can be set as the test condition for that test. The conditions referenced below are examples and are not necessarily considered to be standard default values. Examples of the use of control charts with these tests are:

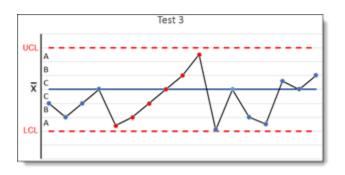
Test 1: Any point outside of the Upper and Lower Control Limits



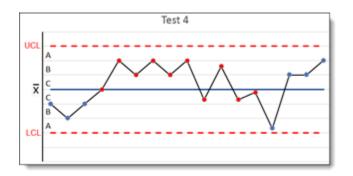
Test 2: 5 points in a row on the same side of the Mean line. (Default is 9)



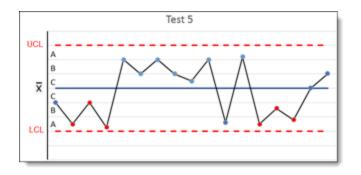
Test 3: 6 points in a row increase or decreasing in the same direction (Default is 6)



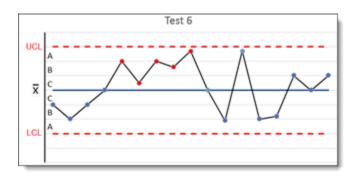
Test 4: 10 points in a row in alternating directions. (Default is 14)



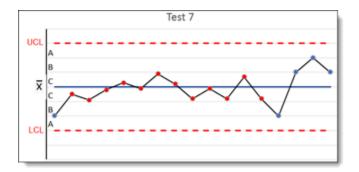
Test 5: 2 out of 3 points more than 2σ from the Mean line (same side). This would be points outside of sections B and C on the graph. (Default is 2)



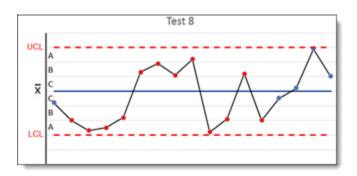
Test 6: 4 out of 5 points more than 1σ from the Mean line (same side). This would be points outside of section C on the graph. (Default is 4)



Test 7: 12 points in a row within 1σ of the Mean line (either side). This would be points inside of section C on the graph. (Default is 15)



Test 8: 12 points in a row more than 1σ of the Mean line (either side). This would be points outside of section C.



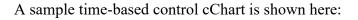
Time-Based cCharts

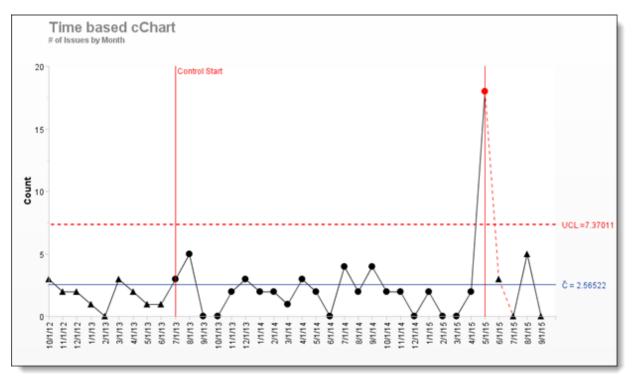
The time-based control chart allows the user to select a date field to be used and displayed on the x-axis. In order to create a new time-base control chart, choose the **Create New Chart Report** option and then choose **Time-based Control cChart** as the chart type. Follow the steps corresponding to the labels on the screenshot below:

Create Chart Save Report Save As Clear All Cancel Print Pag	ge .		ExtraView Charts ?
Chart Options			
Chart title			
Description			
Output to Browser	Use	reporting hierarchy * None *	
	Dis	play on Mobile ?	
	Output R	eport Definition 👔 🗆	
Select chart type 2 Select date field to chart	Select Special Cause tests	Data Options 👔	
Time-based Control cChart	Test 1: Any point outside of the Upper and	d Lower Control Limits	By Date By Previous Periods
	Test 2: 9 points in a row on the same s	# of Periods for Report Data	
	Test 3: 6 points in a row increasing or 6		by days 🗸
	Test 4: 14 points in a row in alternating of		0 ~
	? Test 5: 2 out of 3 points more than 2σ	from the center line (same side) Set Threshold Value	
	Test 6: μ out of 5 points more than 1σ	from the center line (same side) Omit trailing intervals	
	Test 7: 15 points in a row within 1or of th		* None * All *
	—		~
	Test 8: 8 points in a row more than 1σ	of the center line (either side)	
Chart Attributes			
Legend O 0 Values O 0			
Display table of results	Plot area color	#FFFFF 🔛	
Add drilldown links to chart			
Image width 650	Background color	#FFFFF 📑	
Image height 450 Display vertical grid lines			
Display horizontal grid lines			
Max number of points			
	* Saved filter list *		
Advanced	Save / Update Filters ?	Use Allowed Values in Filters 👔 🗌	
Select Field	Operator Value		
Select *	v		
Create Chart Save Report Save As Clear All Cancel Print Pag			
Create Charry Save Report Save As Creat An Cancel Print Pag	le le		

- 1 Chart Options Enter the title and descriptions for the chart
- 2 Chart Type Select the Time-based Control cChart option
- 3 Date Field to Chart Select from a list of the date fields presented in the list
- 4 Select Special Cause tests These options provide the flexibility of specifying the number of points required for each special cause rule. Defaults are provided for the values of the special cause tests and the user may select different values. To turn on one of the tests, check the box at its left. This step highlights points visually on the chart that violate the rules you require. An understanding of cCharts is important when altering the values for these tests
- 5 Date Options The available options in this section are:
 - With the **Timeframe** option, either choose a timeframe from a specific start date with a specific number of periods for the control data, or select by previous periods, where you may choose the number of periods for the report data as well as the number of periods to use for the control data
 - You may Increment the periods reported on the x-axis by either days, weeks, months, years or quarters
 - To clarify the display of the x-axis dates, you may skip a number of labels

- The **Threshold Value** allows you to control the presence of a horizontal threshold line on the control chart display
- If you check **Omit trailing intervals**, you are controling whether the date interval starts on the first day of the month
- Choosing Excluded Control Dates allows you to exclude data for specific dates from being computed as control data points
- 6 Chart Attributes These are the common chart attributes used to embellish the display of all charts
- 7 **Query Filters** Select the approriate filters to be used to select the data set being used to compute the results
- 8 Create Chart Click the button to produce the control cChart.

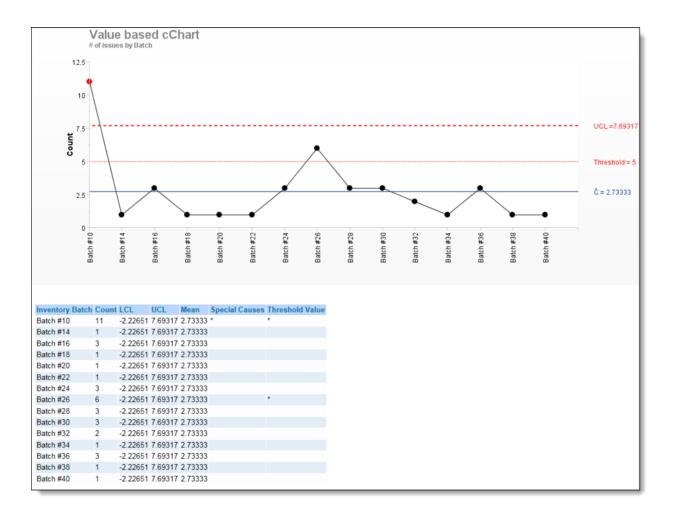




Value-based Control charts

Value-based control charts allow the user to select an enumerated type field to be used on the x-axis. This differs from time-based control charts where a date field is used as the x-axis.

Value-based control charts are set up in a similar fashion to time-based control charts. The key difference is that you choose an enumerated field such as a list field to display on the x-axis. You do not need to enter any date range information. The typical output of a value-based cChart is as follows. The screenshot also shows how a table of results may also be displayed.



Control Charts - uCharts

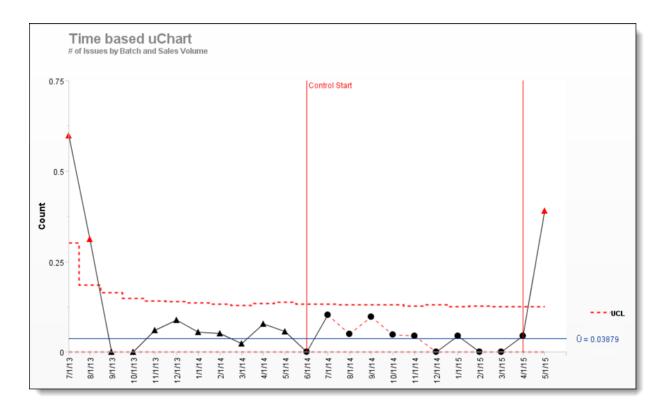
uCharts are a type of control chart used to monitor "count"-type data where the sample size is greater than one, typically the average number of nonconformities per unit. Time-based control uCharts are used if the same sample size is variable. uCharts allows the user to select a date field to be used on the x-axis. They chart records over time in relation to a volume amount.

uCharts differ from cCharts in that they account for the possibility that the number or size of inspection units for which nonconformities are to be counted may vary. Larger samples may be an economic necessity or may be necessary to increase the area of opportunity in order to track very low nonconformity levels.

Preparing a Time-Based uChart is similar to creating a cChart. The differing options are:

- Select the Time-based Control uChart from the selection list of chart types
- Select a Date field to chart from the list
- Select a Date field to aggregate volume by from the list
- Select field for volume amount from the list of numeric type fields

A sample time-based uChart look like the following screenshot:



Column Reports

With Column reports, you select which columns to display, and which filters to set. The resultant report can be sorted by any of the fields displayed, with a single mouse click. Column reports can be saved as personal or public reports. You are able to select from any fields to which you have read permission. To prepare a new Column report, choose the **Create New Column Report** option. The screen presented to you will be similar to the following:

Column Report Report title Custo Description For G	Options omer List	dule Report Delete Report Clea	Title & De				ExtraView Column Report
Browser 500 rows per pag * Select Reporting	e 🗸	~ Report	Options	Transpose Display	Use SLA ? None rows/cols ? . on Mobile ? / Definition ? .	• ~	
Drag or doubl	e-click fields to select,	drag fields to remove or change	· · · · · · · · · · · · · · · · · · ·	Drag or	double click up to 8 f		order field names
2nd Fold title Abstract Actual Renewal Di Actual Time (hrs) Address Application Approved by Asset Type Asset details Assigned To Attachments Display © Fields	ate Available Field to Display	dis Distorter Name Phone Number	A A A A A A B B B B B B		e Available Fields for Sort Order	Custor ID #	ner Na@elected Fields for Sort Order Asc. or Desc. Sort Group Headings
Query Filters	StandardAdvanced	 Condensed Filters Expanded Filters 	* Saved filter list Save / Update F	-			Filter Child Values ?
	Select Field			Operator	Value		
	Business Area(AREA)			\sim equals \sim	Customers	\sim	Depart Eiltere
	Project(PROJECT)			✓ equals ✓	Customer Informati	on 🗸	Report Filters

Creating a column report

Selecting columns to display and the sort order

- Select the columns that you require on your report, by dragging the field to the selected field list or double-clicking on each field name; the selected fields will be moved to the right-hand box. If you want to alter the order of the fields being displayed on the report, you can click on a field in the right-hand box and drag it to a new position. To remove a field from the report, drag it out of the box
- Use the area with **Find a Field ...** to search within the field list. Type any characters within the field title you are looking for. As you type, the list of field titles shortens to allow you to home in on the one you are looking for. If you click the **Show Field Names** checkbox, you will see all the field names as well as the field titles in the list
- By default, the columns that can first be selected are all the fields to which you have permission. If you want to place a button on your report, click on the **Buttons** radio button.

The possible buttons that can be placed on a column report are:

Delete Button	This allows the deletion of the issue					
Edit Button	This button allows you to edit the issue					
History Button	Clicking this button displays the history of the issue					
Quickedit Button	This allows you to use Quickedit mode within the report					
View ButtonDisplays the Detailed Report for the issue						
√ (Record Selector)	Places the record selector button on the menubar of the report. When you click this, a checkbox appears beside each issue which is used to select the issue for further processing, such as a mass update operation, to group the issues together, or to drag the issue within a workspace					

If you want to select from available calculated fields (expressions), click on the Expressions button:

Find a field		Show field names	Fit
Abstract		(Record Selector)	Act
Actual Renewal Date	^	View Button	Ac
Actual Time (hrs)		Edit Button	Ap,
Address		Quickedit Button	Арр
Application		ID #	
Approved by		Priority	Ass As
Asset Type		Product	Au
Asset details		Module	Bď
Assigned To		Status	Bú
Attachments		Title	Bur
Automated 🛛 🖌			Cà
Display	ssions		

• Similarly, choose the columns on which you wish to sort the report. You may select up to four columns on which to sort the report in either an ascending or a descending order. The default of ascending order is first selected when you choose a column. If you do not choose any sort order, ExtraView will use the issue number as the sort order in descending order (i.e. the most recently

added issues will appear first)

• If you click on the title of the browser output to a column report, the report is resorted, using the field you selected in an ascending order. Clicking on the title a second time will resort the report again, this time using the field in a descending order. If you sort on a field, then choose a different field to sort the report on, the first field is still used in the sort order, but secondary to the field you just clicked on.

Column width on the report output

By default, the width of columns on browser output are not set, and the user's browser determines the width of each column using its own algorithms. Most of the time, this works well, but there are times when you might want to more accurately fix the width of the columns being displayed on the output. Right-click on the red button by the field name you selected for the report, and one of the fields allows you to set the width of the column, measured in pixels. This number is approximate, as browsers will sometimes override the number you set, particularly if you are displaying a large number of columns on the screen, relative to the width of the screen. Microsoft Word and PDF column width output are set using the same option.

Transposing the rows and columns on the output

You may use the option **Transpose rows/cols** to alter the report output such that the rows on the report display become columns and vice versa. There is a limit to the number of resulting records that can be displayed in this way. For browser output this limit is much higher that you will be able to see on a display without scrolling a huge amount in a horizontal direction and is much higher than you could ever print on a sheet of paper. However, for PDF output, the width is constrained to the width of the portrait or landscape selection. The number of records output are then truncated. The number of records displayed as being output is omitted to avoid viewing a discrepancy with the number of records selected by the query.

Selected column options

Once a column has been selected to display on a report, a small button appears to the left of the field title. This allows you to set options or attributes, according to the type of field. To view or change the attributes, place your mouse cursor over the button, and click the right-hand mouse button. A window pops up, giving access to the available attributes.

Drag or double-cl	ick fields to select, dra	order	Drag or double click up to 8			
Find a field			Show field names		Find a field	
Abstract		^	View Button		Actual Renewal Date	
Actual Renewal Date			Edit Button		Actual Time (hrs)	
Actual Time (hrs)			ID #		Application	
Address			Last Modified		Approved by	
Application			-		A . T	
Approved by			Report output options for a second	or this field		
Asset Type						1
Asset details			c Alternate Field Title			
Assigned To						
Attachments						
Automated		~	Field Width			
Display	Buttons OExpression	ns				
			<u></u>			
Query Filters	O Standard	Ο	Condensed Filters	* Saved filter	list * 🗸	
	Advanced	۲	Expanded_Filters			Filter Multi-Val
participant and	and a state of the	~	Marshare Mars			

Selecting options for the Category column

In the example shown below, the user right-clicked on an expression type field, where they can enter an alternative title for the field to be displayed on this report's output, a width for the field and an expression and an aggregate function. Calculated expressions are more fully explained in the Administration guide.

Find a field		She	ow field names	Find a field	Find a field		
Expression - Curren	су	View	w Button	Actual Renewal Date			
Expression - Date	·	Edit	t Button	Actual Time (hrs)			
Expression - Day		□ ID #	ŧ	Application			
Expression - Decim	al	Las	t Modified	Approved by			
Expression - Number	er	Pro		Asset Type			
Expression - Text F	ield	P.C.s.	Mushes	Assisted To			
Display OFields Query Filters	OButtons Expres Standard Advanced	sions O C	nate Field Title d Width culated Expression		Multi-Val		
	Select Field						
	Priority(PRIORITY)	Agg	regate Function				

Selecting options on a field that allows calculated expressions

Drag or double-cli	ck fields to select, dra	g fields to remove or change order	Drag or double click up to
Find a field		□ Show field names	Find a field
Expression - Currency		View Button	Actual Renewal Date
Expression - Date		Edit Button	Actual Time (hrs)
Expression - Day		p.iD.#	Application
Expression - Decimal		Report output options for this field	
Expression - Number			
Expression - Text Field		Alternate Field Title	
		1	
		Field Width	
Display OFields O	Buttons Expression	s	
		Add drilldown - use when field contains 'll) # values only
Query Filters	O Standard	O d No Drilldown	
	-		r Multi-V
	Advanced	Expanded Filters	
		Save / Upo	ate Filters ?
	and had	A second second second	and and a strength of the stre

Drilldown option for text fields

Text fields, such as the issue ID field have one additional option, which allows a link to drilldown into the issue to be placed on the field when it is output to a report. This drilldown may be to the *Detailed* report, using the **View** function, or to the *Edit* screen, using the **Edit** function.

Note: You should only place a drilldown on a field that contains an issue number, such as **Issue ID** or a field with a related issue number. It is likely that using a drilldown will generate an error if there is not a valid ID.

Field Display Type	Expression Results
Number, Currency, Decimal	The result will be numeric. For example, you may add or multiply different fields together: To calculate a field that shows the total of an amount plus 8% tax, use an expression similar to: \$\$AMOUNT\$\$ * 1.08
Date, Day	The result will be another date. For example, if you want to calculate a due date, one week after a given date, you may use an expression similar to: \$\$DUE_DATE\$\$ + 7
Text	This can be used to concatenate different text values together. For example, to produce a full name from a field named MYNAME plus a field named MYID, you may use an expression similar to: \$\$MYNAME\$\$ ' ' \$\$MYID\$\$ Note the use of the to concatenate text strings together. This is because the underlying database uses this convention as opposed to using the more natural + to concatenate two text strings. Also, note the use of single quotes around text literals. This is a standard SQL database convention. Double-quotes do not work, and you will receive an error if you use these.

Totaling of Numeric Fields

If there are numeric fields on the report that you have prepared, and the administrator has enabled totaling on the field, then the numeric fields displayed will be totaled.

Sorting the Output

You can click on column titles to sort the report by the values in that column. Note that your administrator must have elected to allow sorting on each field, so not every column on a report may be sortable in this way. If it is sortable, a small grey icon appears to the right of the field. Click on the column title or icon to sort the output. One click sorts the column descending, and one more click sorts the column contents ascending.

Records	1 to 7 o	f 7				Showing the Originator and the Assigned To
Status =	Open	AND Area	= Customer Issue	s		
Prepare	d by Bil	I Smith on	12/11/11 9:04 AN			
		ID # =	Originator 4	Assigned To =	Title -	
View	Edit	10554	Bill Smith	Greg Goldberg	Here is a customer usse	
View	Edit	10357	Bill Smith	Mary Brown	Customer is having diffic	ulty completing installation
View	Edit	10340	Bill Smith	Mary Brown	Customer reports a prob	lem with the widget
View	Edit	10300	Bill Smith	Greg Goldberg	Customer needs help	
View	Edit	10293	Bill Smith	Bill Smith	Customer reports a miss	ing item in the most recent delivery
View	Edit	10285	Bill Smith	Bill Smith	Customer called to say h	e did not receive the spare part sent on 4/3/05
View	Edit	10353	John Customer	Bill Smith	Need to know how exclu	sive or's are processed internally
Count:	7 reco	rds				
Records	44070	. 7				
Records	1 10 7 0	17				

Group Headings

If you click on the rightmost box by a field you have selected as a sort order, then the field is promoted to become a group heading on the output display. This is seen below, when the field Business Area and Assigned To fields were checked and were promoted to group headings. All four sort order fields that can be selected can be promoted to become group headings on a column report.

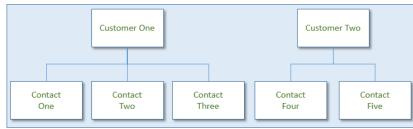
									Refresh	Group Issues	Update Issues	Return	Print Pa
												Records 1 to	o 20 of 120
	Area =	Bugs Smith on March 6, 20	07										
pureu	0) 0110												
		Assigned To	Business Area	= 1D #	Module	Product	Status	Title					
iew/	Edit	Mary Brown	Bugs	10326		Tracker	New	update t	imes right av	/ay!			
/iew/	Edit	Sally Hunt	Bugs	10191	GUI	Tracker Enterprise	Fixed	A single	swalow doe	s not a spring make			
liew	Edit	Bill Smith	Bugs	10165	GUI	Tracker Enterprise	Fixed		a program e Customer iss	xception in the report ues"	ts module, when run	ning the rep	ort named
New	Edit	Bill Smith	Bugs	10102		Tracker	Fixed	Turn left	at the next E	xit			
liew	Edit	Jimmy Duncan	Bugs	10101		Tracker Lite	Not Found	A single	swalow doe	s not a spring make			
New	Edit	Jimmy Duncan	Bugs	10086		Tracker	Not Found	Metal mo	ounting brack	et is too short			
liew	Edit	Susan Green	Bugs	10083		Tracker Enterprise	Fixed	Metal mo	ounting brack	et is too short			
/iew	Edit	Jimmy Duncan	Bugs	10074		Tracker Enterprise	Closed	Save it t	o a file with a	a good name			
/iew/	Edit	Jimmy Duncan	Bugs	10072		Tracker	Not Found	Metal mo	ounting brack	et is too short			
liew	Edit	Jimmy Duncan	Bugs	10069		Tracker	Duplicate	A single	swalow doe	s not a spring make			
/iew	Edit	Jimmy Duncan	Bugs	10065		Tracker Enterprise	Closed	Build it a	nd they will a	come			
liew	Edit	Susan Green	Bugs	10061		Tracker Lite	Duplicate	A single	swalow doe	s not a spring make	1		
atego	ry: Har	dware											
		Assigned To	Business Area	# ID #	Module	Product	* Status	Title					
/iew	Edit	Bill Smith	Bugs	10334	Database	Tracker	Closed	Here is t	the scoop on	the new equipment			
iew	Edit	Jimmy Duncan	Bugs	10284		Tracker	New	Failure 0	03454 recor	ded in stepper motor			
iew	Edit	Bill Smith	Bugs	10104		Tracker	Fixed	Metal mo	ounting brack	et is too short			
/iew	Edit	Susan Green	Bugs	10089		Tracker	Closed	Metal mo	ounting brack	et is too short			
iew	Edit	Bill Smith	Bugs	10059		Tracker Lite	Fixed	Build it a	nd they will o	come			
ntego	ry: Pac	kaging											
		Assigned To	Business Area	= ID #	Module	= Product	Status	Title					
/iew	Edit		Bugs	10233		Tracker	New	The box	is loose				
liew	Edit		Bugs	10222	GUI	Tracker Lite	New	This issu	ue is entered	by a customer role u	iser		
liew	Edit	Susan Green	Bugs	10206		Tracker Enterprise	Fixed	The box	insert needs	to be printed on diff	erent colored paper		
												Records 1 to	20 of 120
								1	Refresh	Group Issues	Update Issues	Return	Print Pa

Sample column report with group headings

Column Reports & Hierarchies

Column reports can work with hierarchies in two separate ways. These ways can also be combined together for output.

The first hierarchical report method uses a predefined hierarchy, as set up and named by your site administrator, and described on the page <u>Reporting on Hierarchies</u>. These hierarchies are typically of the parent-child variety, where one parent issue has some number of child records directly related to the parent issue. For example, a *Customer* issue may each have many *Contacts*. A report will display issues for this simple hierarchy in this fashion:

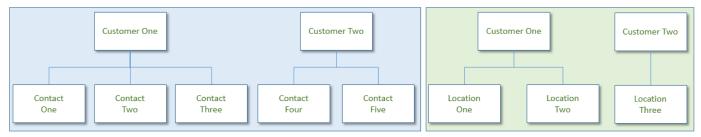


Logical Representation of Simple Parent-Child Hierarchy

Customers	Contacts	
Customer One	Contact One	
Customer One	Contact Two	
Customer One	Contact Three	
Customer Two	Contact Four	
Customer Two	Contact Five	

Report Output of Simple Parent-Child Hierarchy

The second method of hierarchical reports is to combine two or more hierarchies on a single report. This method relies on each hierarchy having the same parent field, but there are two (or more) separate child relationships. The different child records may not have anything in common with each other. These are termed side-by-side hierarchies on the report. Consider this set of relationships:



Logical Representation of Two Hierarchies with the Same Parent

Customers	Contacts	Locations
Customer One	Contact One	Location One
Customer One	Contact Two	Location Two
Customer One	Contact Three	
Customer Two	Contact Four	Location Three
Customer Two	Contact Five	

Report Output of Two Hierarchies with a Common Parent

Note that there is no direct relationship between the *Contacts* and the *Locations*, even though they are displayed on the same row of the report output.

It is possible to present multiple side-by-side hierarchies on a single report, and each of these hierarchies may have multiple levels. In all cases, the records from each of the side-by-side hierarchies will be rendered beginning with the top row of its parent value.

To create a report with a hierarchy, choose the hierarchy you wish to use from the list, as shown below. This will add a new section to the report editor, allowing you to add the fields to be displayed for each level of the hierarchy, as well as a filter section where you can set the conditions for displaying the records at that level:

Column Report	Options						
Report title Custo	mer List	× ?					
10		Loca	line				
Description For G	eneral Use	1000	linze s				
Browser		~		Use SLA	* None *	~	
500				Transpose rows/cols			
500 rows per page	e ~			Display on Mobile			
* Select Reporting	Hierarchy *			Output Report Definition			
Drag or double	e-click fields to select,	drag fields to remove or chan	ige order	Drag or double clic	k up to 8 fields to	set sort order	
Find a field		Show field names	Find	a field		Show field names	
2nd Fold title		View Button	Actu	al Renewal Date		Customer Name	
bstract		Edit Button	Actu	al Time (hrs)	1	ID #	
ctual Renewal Da	te	ID #	Appl	Application			
ctual Time (hrs)		Customer Name	App	roved by			
Address		Phone Number	Asse	at Type			
Application			Assi	Assigned To			
pproved by				mated			
Asset Type			Build				
Asset details				Priority			?
Assigned To				ness Area			
Attachments			Case	e Status			
Display	OButtons OExpress	sions					
Query Filters	O Standard	Condensed Filters	* Saved filter list *	~		Filter Child Values ?	
	Advanced	O Expanded Filters	Save / Update Filt	ers ?	Filte	r Multi-Valued Field Values ?	
	Select Field		1	Operator Value			
10	Business Area(AREA)	~	equals v Custome	rs v]	
and V	Project(PROJECT)		~	equals V Custome	r Information	~	
()				J () (

Selecting a Report Hierarchy

Once you have selected a report hierarchy, you select a side-by-side hierarchy with the additional select list that is displayed at the bottom of the first hierarchy:

Run Report Save Report Save As Clear All	Cancel Print Page					ExtraView Column Report 김
Column Report Options						
Report title Customer Issues						
Description Provide the customer name when y	you run the report			_		
Browser	~			SLA ? None *	~	
500 rows per page V			Transpose rows/ Display on Mo			
Customers>Issues			Output Report Defini			
Drag or double-click fields to select, drag		Drag or doubl	le click up to 8 fields to			
Find a field	Show field names	Find a field		Show field names		
2nd Fold title	View Button	Actual Renewal Date		🗅 🖬 ID #	N	
Abstract	Edit Button	Actual Time (hrs)				
Actual Renewal Date	ID #	Application				
Actual Time (hrs)	Customer Name	Approved by				
Address	Customer Contact	Asset Type				
Application	Contact Phone	Assigned To				
Approved by		Automated				
Asset Type		Building				
Asset details	-	Bus. Priority			? ?	
Assigned To		Business Area Case Status				
Attachments	×	Case Status		2		
Display Fields Buttons Expressions						
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Base level						
Select Field	Oper	ator Value				
Business Area(AREA)	equ	als 🗸 Customer Issues	~			
V Issues		Perform aggregate functio	n on results 👔 🗌 Inc	lude parents without chil	dren ? 🗌	
Find a field	Show field names	Select	Field			Operator Value
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Documentation	Title					
Documentation Impact?	Description					
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Email Address						
Employee Department						
Employee Name	×					
Display Fields Buttons Expressions						
* Add a new Reporting Hierarchy to Base Level *						
Run Report Save Report Save As Clear All	Cancel Print Page					

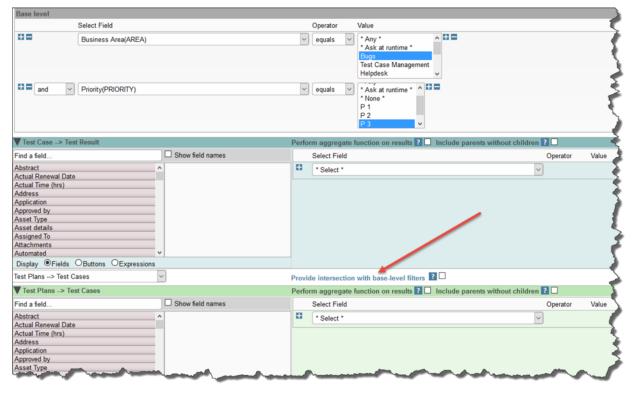
Adding a side-by-side hierarchy

After adding a side-by-side hierarchy, a new set of fields and filters, with a different background color

appear. The side-by-side hierarchy that you select should have the same parent field as the first report hierarchy you selected, else you will not obtain meaningful results.

Within the report result output, there is the usual count of records in the form **Displaying records 1 to nn records of yy**. Note that the **nn** refers to the number of records on the page, and **yy** refers to the total number of issues presented in the report. Given that the report involves one-to-many relationships, this number is likely to be greater than the number of rows on the report.

When you add more than one hierarchy level to a column report, a checkbox appears at each new level as shown here:



Hierachy intersections

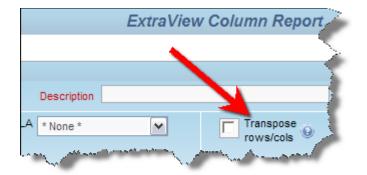
Checking this box causes each level of the hierarchy to be filtered. The filter will look for the database intersection of the issue ID's on each hierarchy level with the issue ID's in the base level. At each hierarchy level, only rows that are returned within the base level and participate in the intersection will be displayed.

There are also checkboxes that appear at each level of the hierarchy, labeled **Include parents without children** and **Exclude parents with children**. These options allow you to control how parents with and without child records appear or do not appear on the report output.

Transposing Rows/Columns

• Add new comment

It is sometimes very useful to transpose (swap) the rows and columns on a report. Checking the option **Transpose rows/cols** performs this action.



Creating a transposed column report

This screen shows the normal output from a report:

ID # 🔻	Priority =	Product =	Status =	Date Created	Days Open 🗉
10564	P 3	Tracker	Open	11/5/09 12:00 AM	0
10557	P 3	Tracker	Open	4/17/09 12:00 AM	201
10552	P 3	Tracker	Open	8/13/08 12:00 AM	448
10544	P 1	Tracker	Open	5/26/08 12:00 AM	527
10475	P 4	Tracker Enterprise	Open	2/23/07 12:00 AM	986
10454	P 2	Tracker Enterprise	Open	3/7/06 12:00 AM	1339
10323	P 1	Tracker	Open	4/27/05 12:00 AM	1652
10272	P 1	Tracker	Open	3/20/05 12:00 AM	1690
10269	P 2	Tracker	Open	3/20/05 12:00 AM	1690
10226	P 1	Tracker	Open	1/27/05 12:00 AM	1742
Count: 10) records				

Normal output

This screen shows the same report, with the rows and columns transposed:

ID # 🔻	10564	10557	10552	10544	10475	10454	10323	10272	10269	10226
Priority =	P 3	P 3	P 3	P1	P 4	P 2	P 1	P 1	P 2	P 1
Product =	Tracker	Tracker	Tracker	Tracker	Tracker Enterprise	Tracker Enterprise	Tracker	Tracker	Tracker	Tracker
Status =	Open	Open	Open	Open	Open	Open	Open	Open	Open	Open
Date Created =	11/5/09 12:00 AM	4/17/09 12:00 AM	8/13/08 12:00 AM	5/26/08 12:00 AM	2/23/07 12:00 AM	3/7/06 12:00 AM	4/27/05 12:00 AM	3/20/05 12:00 AM	3/20/05 12:00 AM	1/27/05 12:00 AM
Days Open 💷	0	201	448	527	986	1339	1652	1690	1690	1742
Count: 10 records										

Transposed output

Service Level Agreement Reporting

If your administrator has configured your installation to report on Service Level Agreements, a selection list will appear at the top right-hand of the screen, with the title **Use SLA**. This is a list of administrator-defined Service Level Agreement (SLA) criteria. An SLA is a measurement that can display one of three indicators, depending on the criteria and the time the issue has been in a given state. This table shows how your organization may have defined SLAs that are expected to be met.

Status Transition

Priority	New-Open	Open-Resolved	Resolved-Closed
P1 Issues	< 2 hours	< 1 day	< 2 days
P2 Issues	< 4 hours	< 5 days	< 30 days
P3 Issues	< 1 day	No commitment	< 180 days

Consider an issue that has a given priority of **P2**. This is governed by the middle row in the table. Your defined workflow is to transition the issue from **New** to **Open** to **Resolved** to **Closed** as your personnel address the issue.

- 1. If the issue being addressed is in an **Open** status and two hours have elapsed since the issue was created, then it is within normal time limits. In this case, a **green** indicator is displayed on the report
- 2. If the issue being addressed is approaching the deadline and three hours have elapsed, an **amber** indicator may be displayed on the report to indicate that you are in jeapordy of not meeting the SLA
- 3. If more than four hours have passed, the issue being addressed has exceeded the agreed SLA. In this case, a **red** indicator is displayed on the report.

You prepare an SLA report like any other column report, but must select one or more **SLA States** to place on the report. The SLA report may be saved and updated like all other reports. The following is an example of output from a SLA report.

Refresh G	roup Issues	Mass Update Issues	Return Filters	Print Page		Oper	n Issue SLA
Records 1 to 2	of 2						Customer Issues
Area = Custor	ner Issues /	AND Status = Open /	AND Priority = P 1, P	2			
Prepared by E	Bill Smith on	3/3/12 9:25 PM					
	ID # ▼	Assigned To =	Date Created =	Customer =	Title =	P 1 Issues	P 2 Issues
View Edit	10573	<u>George Miller</u>	3/3/12 12:00 AM		Customer reports an error in the report module	In 00:00:01	
View Edit	10554	Greg Goldberg	12/19/08 12:00 AM	Info Technology	Here is a customer issue		Out 1144:04:41
Count: 2 rec	ords						
Records 1 to 2	of 2						
Refresh G	roup Issues	Mass Update Issues	Return Filters	Print Page			

Ranking Reports

Ranking fields may be set up by the administrator. A ranking field is used to indicate the relative importance of each issue in a collection, for example as part of a product release cycle, indicating the order in which issues may be tackled. Ranking fields may have filters as part of their definition. These filters allow great flexibility, for example to set different rankings for different users. You might for example rank, or order, all the issues assigned to you as part of a product release cycle.

Rank fields may have been placed on *add* and *edit* layouts as well as on reports, and may be manipulated in all these places. However, they really come into their own when you view the collection of issues and their rankings together on a column report. Assuming you are running within a workspace, you can drag any issue within the collection to a different spot, and the rankings are automatically updated to reflect the

new position in the report. When you edit a rank field on an *edit* screen, the updates to the ranking will still occur, but you do not have visibility of the ranking of all the other issues in the collection. To set up a ranking report, use the following procedure:

- Create or modify a column report within a workspace. You must be within a workspace to enable drag-and-drop to alter the ranking of the issues within the report
- Place the fields you wish to see along with your ranking field on the report. If you have access to more than one ranking field, only place one on a report, else the results you achieve when modifying a ranking will be ambiguous
- Set the sort order of the report to be the ranking field, ordered ascending
- It is advised to set the number of rows being displayed on a report page to a number higher than the total number of issues on the report output. You cannot drag issues from one report page to another, only within a page
- Save and then run the report
- If the rankings have not been set at this moment, the ranking column will not have any values. If the rankings have been set, then you will see the ranking field for the first issue with a value of 1, the second issue will have a value of 2, etc.
- Drag-and-drop the issues within the report. As you do so, the issues will aiutomatically reorder, showing the rankings in an ascending numeric order.

Run Report Save Report Save As S	chedule Report Delete Report Clear All	Cancel Print Page	ExtraView Column Report ?
Column Report Options			
Report title Rank Issues for Release	2		
Description Enter Release Number at Run	time		
Browser	~	Use SLA 👔 * None *	~
500 rows per page		Transpose rows/cols ?	
* Select Reporting Hierarchy *		Output Report Definition ?	
Drag or double-click fields to select,	drag fields to remove or change order	Drag or double click up to 8 fields to	o set sort order
Find a field	Show field names	Find a field	□ Show field names
2nd Fold title	^ ■ ID #	Actual Renewal Date	·
Abstract	Ranking	Actual Time (hrs)	ID #
Actual Renewal Date	Priority	Application	
Actual Time (hrs)	Title	Approved by	
Address	Status	Asset Type	
Application	Module	Assigned To	
Approved by	Edit Button	Automated	
Asset Type	Quickedit Button	Building	
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Ranking Report Editor

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10053	1	P 4	Have wings will fly, that's what they say	Not Found		Edit	Qedit	View	
10010	2	P 4	How do I do this operation?	Closed		Edit	Qedit	View	
0091	3	P 4	Build it and they will come	New		Edit	Qedit	View	
0073	4	P 4	Turn left at the next Exit	Fixed		Edit	Qedit	View	
0058	5	P 4	Turn left at the next Exit	New		Edit	Qedit	View	
0084	6	P 2	A single swallow does not a spring make	New		Edit	Qedit	View	
0068	7	P 4	Have wings will fly, that's what they say	Closed		Edit	Qedit	View	
0071	8	P 2	Have wings will fly, that's what they say	Fixed		Edit	Qedit	View	
0088 10	060 13	P2 P4	Tum Have wings will fly, that's what they say	Open Closed	1	Edit	Edit	Zedit _{ew} V	liev
0065	10	P 1	Build it and they will come	Closed		Edit	Qedit	View	11
0059	11	P 2	Build it and they will come	Fixed		Edit	Qedit	View	
0076	12	P 4	Save it to a file with a good name	Fixed		Edit	Qedit	View	
0060	13	P 4	Have wings will fly, that's what they say	Closed		Edit	Qedit	View	1
0078	14	P 1	A single swalow does not a spring make	Closed		Edit	Qedit	View	1
0064	15	P 2	Turn left at the next Exit	Fixed	Databas	e Edit	Qedit	View	
0070	16	P 4	Build it and they will come	Closed		Edit	Qedit	View	
0077	17	P 2	Metal mounting bracket is too short	New		Edit	Qedit	View	
0057	18	P 1	Metal mounting bracket is too short	New		Edit	Qedit	View	
0075	19	P 2	Turn left at the next Exit	New		Edit	Qedit	View	
0063	20	P 4	Metal mounting bracket is too short	Fixed		Edit	Qedit	View	
0062	21	P 2	Save it to a file with a good name	Not Found		Edit	Qedit	View	
0074	22	P 4	Save it to a file with a good name	Closed		Edit	Qedit	View	
0042	23	P 4	Have wings will fly, that's what they say	Fixed		Edit	Qedit	View	
0067	24	P 2	Turn left at the next Exit	Fixed		Edit	Qedit	View	
0066	25	P 4	Save it to a file with a good name	Closed		Edit	Qedit	View	
10081	26	P 4	A single swalow does not a spring make	Not Found		Edit	Qedit	View	
0018	27	P 4	Have wings will fly, that's what they say	Closed		Edit	Qedit	View	
10072	28	P 4	Metal mounting bracket is too short	Not Found		Edit	Qedit	View	

Ranking Report Output Showing an Issue Being Dragged

Note the **Ranking** field in ascending order on the report output. The screen shows an issue being dragged and dropped to a higher position. Once dropped, the rankings to all of the issues less than the one on which the issue is dropped will be reordered.

Note: A change to the ranking order does not cause any entries in the history of an issue. Ranking fields are not subject to the normal audits. This is because during a ranking session, there may be thousands of updates to the database. These changes have no real value yet might take a long time to perform.

Merging Data with Microsoft Word Templates

This feature is used to merge ExtraView data produced with a Column report, with a Microsoft Word template that contains mailing (or similar) data. The typical use for this report is to create a Microsoft Word document containing mailing labels, using data from ExtraView issues.

The steps to create the mailing labels are as follows:

- First, create the Microsoft Word template
 - It is recommended that you work with a standard document to begin with, saving it with a .doc or .docx extension
 - You will design the document with the appropriate mailing labels, using the Microsoft Word MAILINGS function
 - Within the MAILINGS function, you compose each label similar to this screenshot. Notice that you embed the ExtraView field names within \$\$ tokens

velopes and Labels <u>Envelopes</u>	
Address:	📰 🔻 🔲 Use <u>r</u> eturn address
\$\$ORIGINATOR\$\$ \$\$TATUS\$\$ \$\$ID\$\$ \$\$PROJECT\$\$, \$\$AREA\$\$ \$\$ID\$\$	
Print Eull page of the same label Single label Row: 1 * Column: 1 *	Label Microsoft, 1/2 Letter 1/2 Letter Postcard
Before printing, insert labels in your printer Print New Document	s manual feeder. Options E-postage Properties
	Cancel

- Use the **Options** button within the above dialog to select or design the mailing label style you want to use
- The final template must be saved as a .dot or .dotx Word template file. If you need to make subsequent changes to the template, do not modify the .dot or .dotx file as this will invisibly break the internal structure of the template file. To make changes, edit the .doc or .docx file, then re-save as a .dotx file. The template file will look something like this:

<u>+</u>		
\$\$ORIGINATOR\$\$ \$\$STATUS\$\$	\$\$ORIGINATOR\$\$ \$\$STATUS\$\$	\$\$ORIGINATOR\$\$ \$\$STATUS\$\$
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\$\$PR0JEC1\$\$, \$\$AREA\$\$ \$\$10\$\$	\$\$PROJEC1\$\$, \$\$AREA\$\$ \$\$1D\$\$	\$\$PROJECT\$\$, \$\$AREA\$\$ \$\$ID\$\$
\$\$ORIGINATOR\$\$	\$\$ORIGINATOR\$\$	\$\$ORIGINATOR\$\$
\$\$STATUS\$\$	\$\$STATUS\$\$	\$\$STATUS\$\$
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• Now use the column report editor to compose the Column report. The key point is to select the output type as **Microsoft Word mail label (merge with uploaded file)**. You may then upload the .dot or .dotx template file

Run Report Save Report Save As Clear All Car	nncel Print Page			ExtraView Column Report ?
Column Report Options				
Report title				
Description				
Microsoft Word mail label (Merge with uploaded file)	Output Report	Definition 👔 🗆	Merge data with MS Word Template	? Upload Template
Drag or double-click fields to select, drag fields to	to remove or change order	Drag or double cli	ick up to 8 fields to	o set sort order
Find a field	Show field names	Find a field		Show field names
2nd Fold title ^ Abstract Antyal Report Qate	m	Actual Renewal Date Actual Time (hrs)	^	

- Select the fields to be output into the template, and any fields you might want to use to sort the results
- Select the filters you want for the report to obtain the issues for the labels
- When you run the report, the output will be a Microsoft Word document, with the data merged from the ExtraView issues that are selected by the filters of the report.

Merging Data with Microsoft Excel Files

There can be a need to use ExtraView data for reports that cannot be created within ExtraView, but can be created within Microsoft Excel. This feature extends ExtraView so that you can harness all of Microsoft Excel's capabilities in conjunction with any subset of ExtraView data. For example, you might want to use ExtraView data within a pivot table, or you may want to generate charts that are outside the scope of ExtraView's own charting capabilities. Column reports use this feature to achieve this purpose. The procedure to merge ExtraView data with an Excel spreadsheet/workbook is as follows:

Create the Excel sheet that contains the ExtraView data

Create an individual sheet which will be used to hold the ExtraView data. This will most often be empty of data, but the columns should be formatted as follows to receive data of the correct type. The columns may also contain Excel formulae. The ExtraView data is merged with the sheet and only overwrites values, not the formulae.

- All ExtraView text type fields do not require any formatting in the sheet
- ExtraView date and day display types will be placed in columns in the sheet as seconds since the epoch
- ExtraView currency and numeric display types will be placed in columns in the sheet as plain numbers
- It is not valid to send buttons, image and document display types to the Excel sheet
- Save the workbook. It must be saved with an extension with an extension of **.xlsx**. The old style **.xls** files are not supported

The following screenshot show how it might look, *after ExtraView populates the data into this sheet*. Again, the sheet should be empty at this stage:

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The Excel data sheet

Create the remainder of the Excel workbook

Create an additional sheet, or sheets, within the same Excel spreadsheet, which contain the reports or other Excel objects. These should source the ExtraView data by referencing a data range within the first sheet you created. An example pivot table might look like this:

	🚽 🖉 = (° = 1 =	ExtraViewRepo	rt_109351.xls [Con	npatibility Mode]	- Microsoft Ex	cel	PivotTable Tools	
F	ile Home Ins	ert Page Layou	t Formulas	Data Review	View A	dd-Ins	Options Design	X 🖬 🗆 🕃 A
	🗎 👗 🛛 Arial	· 10 · 3	=	General *	A Part	nsert 👻	Σ • Α	
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	А	В	С	D	E	-	PivotTable Field List	▼ X
1		Drop Repo	rt Filter Fields He	ere				
2	Sum of IssueCount	Category 💌					Choose fields to add to re	eport:
4			Documentation	Packaging	Grand Total	_	Originator	
5	Bill Smith	2			4		Category	
	Chris Robinson	24	10	16	50		Product	
	Jimmy Duncan		40	1			▼ IssueCount	
8	Grand Total	26	12	17	55			
10								
11								
12								
13								
14						_		
16						=		
17								
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19 20							Drag fields between areas	
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20	Pivot Table	Source 😤		4		► I	Defer Layout Update	Update
Rea		Source Ca					■□□ 100%	
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The Excel output report

Save the spreadsheet

Note that the spreadsheet must be saved as type XLS, not type XLSX. This is due to a limitation in third-party utility software used to manage the Excel spreadsheet within the ExtraView server.

Upload the spreadsheet to ExtraView

Now, you upload the saved spreadsheet into ExtraView. Create a new Column report, then select **Microsoft Excel (Merge with uploaded file)** as the output format. Most of the report creation is identical to creating other column reports.

Column Report Options Report title	
Report title	
Description	
Microsoft Excel (Merge with uploaded file)	xcel File Excel Sheet * None * ~
* Select Reporting Hierarchy * 🗸	Titles in Sheet Format
Drag or double-click fields to select, drag fields to remove or change order Drag or double click up to 8	fields to set sort order
Find a field Find a field	Show field names

Creating the report

- Click the button to upload the Excel workbook / spreadsheet. This takes a copy of the spreadsheet from your local computer and places it in the database on the ExtraView server
- The titles to all the sheets contained within the Excel workbook are displayed in the select list. Choose the sheet that is to be the destination for the ExtraView data
- The default is that the ExtraView data will be placed at the top left-hand corner of the sheet, beginning with cell **A1**. You may alter the beginning cell by placing the data at any other row and column in the sheet
- Use the checkbox **Include Column Titles in Sheet** to indicate whether you want the column titles from the ExtraView data to be placed in the sheet. Note that for most purposes you want the column titles to match up with the titles as they will be used in the other sheets inside the Excel workbook. The matching is case sensitive
- The checkbox **Use Template Format** gives control of the data formatting within the spreadsheet that is output. If this box is not checked, then ExtraView's field formats are used. If this is checked, then the formats of the data within the spreadsheet are observed and used. This has uses to control items such as the format of dates in the spreadsheet. You might want to use the format mandated by the cell formats in the spreadsheet, or you might want to use the user's date format as specified by their personal options.
- Select the columns for the report that are to be used to fill in the Excel data sheet
- Apply any filters required
- Save the report in the normal way.

Run the report

When you run this report, ExtraView will take the data returned by the query, and populate the Excel sheet. The report is then downloaded for you, in the form of a standard Excel spreadsheet.

Tips

- Wrapping text within Excel cells it is recommended that you highlight all rows within your spreadsheet and set the text wrapping option before saving and uploading to ExtraView. If you do not do this, then you have to double-click within the cell in the downloaded report before the text wrapping works
- Custom date formats it is not recommended that you set your personal options within ExtraView to use a custom date format. Excel does not understand all the possible custom date masks that can be used.

Custom URL Reports

As the name implies, Custom URL reports allow the user to create a custom report, which may or may not involve execution of the report within ExtraView. The key point is that these reports use the ExtraView framework to present the report.

For example, the report may execute ExtraView custom code to present results in a way that the inbuilt ExtraView functions were never designed. As well as executing code within ExtraView, Custom reports can run almost anything that can be accessed via a URL.

Note that the security of your browser may be set such that URLs may not be opened within an ExtraView screen, as this might be seen as a cross-domain event. Most browsers have settings that allow you to control this. For example, within Internet Explorer, you can set the domain of the site you want to view within a dashboard report, to *trusted* status.

Example 1

This shows the preparation of a report executed with custom code within the ExtraView environment. Note on the screenshot how a URL is called within the ExtraView environment, and how filters that are set can be passed to the code:

Run Report Save	Report Save As Sc	hedule Report Delete Rep	ort Clear All Cancel Print Page	ExtraView Custom URL Report ?
Custom URL Rep	oort			
Report title Breakd	lown of Customer Issues		2	
Description	Custo	m Pie Chart	Localize	
Output to Browser 500 rows per page	>			
URL for Report				
encounter problems	and program exceptions.			enter an invalid address and run this report, expect to
Select Filters ?	O Standard	Condensed Filters	* Saved filter list *	Use Allowed Values in Filters 🔋
	Advanced	O Expanded Filters	Save / Update Filters ?	
	Select Field		Operator Value	
00	Business Area(AREA)		v equals v Custo	omer Issues
and 🗸	Customer Name(CUST	LIST)	not equal 🗸 * None	e * 🗸 🗸
Run Report Save	Report Save As So	hedule Report Delete Rep	ort Clear All Cancel Print Page	

Preparing a Custom URL report that executes code within the ExtraView environment

Example 2

Here we will access a URL outside of ExtraView, the Google search page, and then open this within the ExtraView environment. The second screenshot shows how this "report" may be accessed from within a workspace:

Run Report Save R	eport Save As Scl	hedule Report Delete Rep	ort Clear All Cance	I Print Page	ExtraView Custom URL Report
Custom URL Repo	rt				
Report title Breakdow	vn of Customer Issues		?		
Description	Custor	n Pie Chart	Localize		
Output to Browser	~				
500 rows per page	~				
URL for Report					
Enter URL address for	r report http://www.go	ogle.com			
		or https://) or a relative path to	a custom code location	within ExtraView. If	you enter an invalid address and run this report, expect to
encounter problems an Open in new tab?		n the report in a new tab/windo	ow when in Workspace r	node.	
Select Filters ?	O Standard	Condensed Filters	* Saved filter list *	~	Use Allowed Values in Filters ?
	Advanced	O Expanded Filters	Save / Update Filt	ers ?	-
Select Field			Operator	Value	
Select *			~		
Run Report Save R	eport Save As Scl	hedule Report Delete Rep	ort Clear All Cance	Print Page	

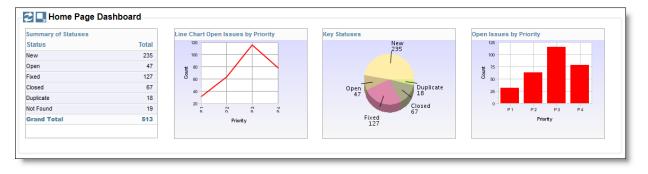
Creating a Custom report that accesses the Google search engine

ExtraView Report	
Report Options	
Create new column report	
Output to saved format	tomers Feature Requests Knowledge Base Max
20 rows per page	
	* None * Severity * None *
Saved Reports Manage User Groups Manage Scheduled Reports Manage Report	
	* None * Customer * None *
₽ 🛈 My Reports	
Edit All Feature Requests - That are open	* None * 💌 Owner * None * 💌 🏕
Edit Assigned To By Status - Assigned To By Status Group By Report	Source Control Release Notes
Edit Assigned To by Status - For a Group By Rport Edit Breakdown of Customer Issues - Custom Pie Chart	
Edit Breakdown of Statuses - Custom Bar Chart	Screenshot
Edit Bugs I Fixed in January - Bugs not Closed Yet	
Edit Google - Search	POX
- B Edit Grouping Statuses on a F +You Web Images Videos Maps Ne	ews Gmail More 🗸 🧧 Sign in 🔅 🔶
Edit My Hot List - Priority 1 iss Edit Owners of open bugs - S	
_ FE Edit Report of Open issues - E	
$-\sum$ Edit Report of bugs by Catego	
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- ∑ Edit Assigned to you - Issu	
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e-∭ Dashboard Reports ∢	
Edit Key Statuses - For Home Page Dashboard	·

The Google search screen within a workspace

Dashboard Reports

Dashboard Reports are created for the purpose of placing these on user's Home Pages. Like all other reports, they may be personal or shared. A dashboard report is designed to show summary information. This summary information may originate in a Summary Report, a Matrix Report, an Aging Report, a Chart or a Custom URL report.



A typical Dashboard Report

You may place up to 10 individual reports on a Dashboard Report, up to 10 horizontally, and up to 10 vertically. Care should be taken when designing a Dashboard Report, to ensure that you place these in a readable fashion and that you do not try to place too much information on the dashboard. To create a new Dashboard Report, choose the option **Create new dashboard report** from the list of new report types on the Query screen and press the **Go** button. You will see a screen similar to the following:

Save Report Save As Clear All Cancel Pr	int Page							E	xtraView Dashboard	l Report 💡
Dashboard Options										
Report title										
Description										
Select Reports to Place on Dashboard 👔										
Number of rows of reports 1										
Number of columns of reports 4										
* Select a report *		"Select a report "		-	* Select a report *		-	* Select a report *		-
Width 250 Height 200	Test	/idth 250	Height 200	Test	Width 250	Height 200	Test	Width 250	Height 200	Test
Example Output										
Global Query Filters 2 Select Field		Ope	rator Value							
Select *		•								
Save Report Save As Clear All Cancel Pr										

Creating a new Dashboard Report

Like all other reports, you may set the report title and description. Note that the report title will be displayed as the title to the entire dashboard report when it is placed on your Home Page. You can alter the number of rows and columns of the reports contained in the dashboard report at any time, when first creating or when editing a dashboard report. When editing a report, there is a button to the right of the **Report Title**. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful for managing public reports. The reports that may be placed on the dashboard report are placed in select lists; you may alter the display size of any report by using the **Width** and **Height** options. These are measured in pixels. Note that you should not exceed the width of the window for your dashboard reports. The overall default size is set by the administrator, and is typically around 1,000 pixels. The **Test** button allows you to run the report and

place it on the dashboard so you can check for the presentation.

Save Report Save As Clear All Cancel Print Pr	age		ExtraView Dashboard Report ?
Dashboard Options			
Report title			
Description			
Select Reports to Place on Dashboard 👔			
Number of rows of reports 1			
Number of columns of reports 4			
Public:Open Issues by Priority, For Home Page Das	* Select a report *	Select a report *	Select a report *
Width 250 Height 200	Test Width 250 Height 200	Test Width 250 Height 200	Test Width 250 Height 200 Test
Example Output Open tasses by Priority			
Global Query Filters ? Select Field	Operator Value		
Select *			
Save Report Save As Clear All Cancel Print Pa	age		

One chart placed on a Dashboard

As you place reports onto the dashboard, it is recommended that you resize immediately. Note that when we placed the next report on the dashboard, we resized the output to a width of 350 and a height of 220, to retain a reasonable presentation of the results. All titles are placed at the top of the individual dashboard reports, and the reports are always rendered with the *small* font size, no matter the user's personal option setting. This is to allow sharing of the dashboard amongst users who may have selected different text sizes and to maximize the amount of information on a dashboard.

Save Report Save As Clear All Cancel Print Pag	e							Ex	traView Dashboard	Report
Dashboard Options										
Report title										
Description										
Select Reports to Place on Dashboard										
Number of rows of reports										
Number of columns of reports 4										
Public:Open Issues by Priority, For Home Page Das	Public:Bugs by Priority	by Status, Matrix	report		Select a report *		-	* Select a report *		[
Width 250 Height 200 Te	Width 350	Height	220	Tes	Width 250	Height 200	Test	Vidth 250	Height 200	Test
Example Output										
Open Issues by Priority	Bugs by Priority by S	Status								
125		P1 P2	P3 F	4 Total						
900	New	4 8	7	15 34						
g 75	Not Yet Tested Open			1 1						
8 50	Fixed	11 19		25 56						
25	Closed	4 6	1.1	19 29						
	Duplicate	4		4 8						
P1 P2 P3 P4	Not Found	1 2		5 8						
Priority	Total	22 46	12	75 155						
Global Query Filters 2										
Select Field	(Operator	/alue							
Select *	-									
Save Report Save As Clear All Cancel Print Pag										

Placing a second report on a Dashboard

ave Report Save As Clear All Cancel Print	Page										ExtraView Dashboard	d Report
ashboard Options												
eport title												
escription												
elect Reports to Place on Dashboard												
Number of rows of reports 1												
Number of columns of reports 4												
Public:Open Issues by Priority, For Home Page Das	• P	ublic:Bugs by Priority by S	Status, Matrix	report			-	Public:Summary of All Issues, Chart of All Status	-	Public:Summary	y of Statuses, For Home Page Dashboa	
/idth 250 Height 200	Test W	idth 350	Height	220		1	Test	Width 250 Height 200	Test	Width 250	Height 200	Test
xample Output												
Open Issues by Priority		Bugs by Priority by	Status					Summary of All Issues			Summary of Statuses	
125			P 1	P 2	P 3	P.4	Total				Status	Total
100		New	4	8	7	15	34		New 235		New	235
		Not Yet Tested				1	1				Open	47
3		Open	2	7	4	6	19				Fixed	127
N		Fixed	11	19	1	25	56	Open	Not Found		Closed	67
26		Closed	4	6		19	29	47	19		Duplicate	18
0		Duplicate		4		4	8		Duplicate		Not Found	19
P1 P2 P3 P4 Priority		Not Found Total	22	2 46	12	5	155	Fixed 127	Closed 67		Grand Total	513
		TOTAL	u		14	78	100		-			
lobal Query Filters ?												
Select Field		Ope	rator	Value								
* Select *		-										

Completing a single-row Dashboard Report

Once you have saved your dashboard report, you may place it on your Home Page, in exactly the same way as any other report. Dashboard reports have one special property not shared with other reports. If you are going to share a dashboard across a user role, or make it public, only the dashboard report itself needs permission to be run by the other users. The other users do not need to have permission to run the reports within the dashboard. This permission will be given to them automatically. This allows you to keep the reports within the dashboard as personal reports so that the other users may not individually run or edit these reports. However, the individual field permissions still apply so users will not see fields to which they do not have read permission.

Runtime Replacement Filters

Setting runtime replacement query filters on dashboard reports allow you to apply these filters to all the individual reports configured within the dashboard report. For example, you might want to apply the same date range to all the reports, or to select a single report as a filter for all the reports. Note that if any of the reports contain a filter on a field used as a runtime replacement filter, then the filter at the individual report level is dropped completely and replaced with the runtime replacement filter for the field.

For example, you might want to apply a runtime replacement filter that applies the same date range to all the output, or apply a filter that provides only results from a specific product within the output.

When you specify runtime replacement filters within a Dashboard Report, they will replace filters for the same field within the individual reports that they contain. If a filter on a field specified at the dashboard level does not appear within the contained report, it will have no effect. Further, it is not possible to specify conjunctions for the runtime replacement filters - they simply replace filters for the same field within the contained reports. The runtime replacement filters are always displayed in expanded mode, allowing you to make multiple selections within a field. Runtime replacement filters within a dashboard report are ignored if the dashboard report is placed on a Home Page. It would not be good behavior to stop every entry to the Home Page and ask for a replacement filter to be selected.

Tip: A typical use case might be to create a dashboard that contains several reports about all your products, but you want to filter on the report output by a single product. You cannot select a runtime replacement filter with a value similar to Product = Any, but you can select all the product values in the list and store

that as your filter. Then, after viewing the dashboard, you can select a new filter value that is either just one, or a selection of products.

Matrix Reports

When selected, this feature creates a report where ExtraView will display a results grid with one or more selected fields across the page and one or more selected fields down the page. When used with the aggregation method to *count issues*, this report will produce results identical to running a summary report with two selected columns, but rather than the results being displayed in a column, they are displayed in a grid form. Examples of useful matrix reports include:

- A report of statues of issues by customer
- Break down the number of issues by priority, by product
- Breakdown the number of reported issue by customer for the last month
- Display a count of the issues created by country, by region over each month for the last two years.

You are able to select from any fields to which you have read permission, and which are able to be summarized and counted. For example, you can typically summarize on different values in a list, but cannot summarize on text fields.

To prepare a new Matrix report, choose the **Create New Matrix Report** option. The screen presented to you will be similar to the following:

Run Report Save	Report Save As C	lear All Cancel Print Page			ExtraView Matrix Report ?
Matrix Report O	ptions				
Report title					
			_		
Description					
Browser	~	Add Statis	stics to Report 👔 🗹 Total 🔲 Percent 🔲 Mean 🗌 M	Ain 🗆 Max	Display on Mobile ? 🗌
		Aggre	gation Method 👔 🖲 Count Issues 🔿 Sum Issues		Output Report Definition <mark>?</mark> 🗆
* Select Reporting	Hierarchy * 🗸		Comparison ? * None *		Wrap Values on Output 👔 🗆
Soloot Fields to F	Form Matrix Report				
Fields Across Colum			Fields Down Rows (Y axis) ?		
Find a field		□ Show field names	Find a field	🗆 si	now field names
Actual Renewal Date	e	^	Actual Renewal Date	^	
Actual Time (hrs)			Actual Time (hrs)		
Application			Application		
Approved by			Approved by		
Asset Type			Asset Type		
Assigned To			Assigned To		
Automated			Automated		
Building			Building		
Bus. Priority			Bus. Priority		
Business Area			Business Area		
Case Status Category			Case Status Category		
Cell Phone		~	Category	~	
Include columns with	no data ? 🗆		Include rows with no data 👔 🗆	Sort	on ? *None *
Query Filters	O Standard	Condensed Filters	* Saved filter list *		Values in Filters ? 🗆
	Advanced	O Expanded Filters	Save / Update Filters ?	Filter Multi-Val	ued Field Values <mark>?</mark>
Select Field			Operator Value		
Select *			~		
Run Report Save	Report Save As C	lear All Cancel Print Page			
		outer age			

Creating a new matrix report

Selecting columns to summarize and display

- There are two basic counting mechanisms for matrix reports. You can simply count the number of issues that are at the intersection of the two axes you select and filtered by your selection, or you can sum the values within a specific field that are at the intersection of the two axes. These produce quite different results.
- Select the columns that you require on your report, by selecting up to four field names from the **Field across (X axis)** list, and then select up to four fields from the **Field down (Y axis)** list
- You can use the options **Include columns with no data** and **Include rows with no data** to display columns and rows on the report that have zero values. The default is that if all values for a column or all values for a row are zero, then that column or row will not be displayed. If the field you are using for the X axis or the Y axis is not of a list type, then this option is ignored. For example, if you are summarizing on a text field, you cannot include rows or columns with no data. This is because you may be selecting a huge number of values with no data, a circumstance that will inevitably lead to a report that does not display reasonable data.

Columns on the report output may be sorted by clicking on the column title. When there is more than one field on the Y axis, and you have selected an option to display sub-totals, then the sort takes place within each group of results.

The following two screenshots show a matrix report with the same axes selected, **Assigned To** and **Category**. The first report shows a count of the issues within each **Category** that are **Assigned To** each user. The second report is summing the **Time Spent** within the issues by each of the **Assigned To** personnel within each **Category**.

								By Calleg	ory and Assi	gned it
Prepared by Bill Smith	n on Aug 11, 3	2014								
Business Area = Cus	omer Issues					_				
	Dill	Chair	C	C	Assigned		Marri	CCM	Current	
	Bill Smith	Chris Robinson	George Miller	Greg Goldberg	Jimmy Duncan	Mary Brown	Mary Dickens	SCM Daemon	Susan Green	Tota
Documentation	3	6	1	4	6	1			2	23
Packaging	1	5	3	1	5	2			3	2
Software	7	10	4	5	7	3	2	1	4	4
Total	11	21	8	10	18	6	2	1	9	8

Sample matrix report counting issues

			_						By Cated	ory and Assi	igned T
									5, 00.09	ory and noor	gnou
re	pared by Bill Smith	on Aug 11, 2	2014								
us	siness Area = Custo	mer Issues									
						Assigned	Го				
		Bill Smith	Chris Robinson	George Miller	Greg Goldberg	Jimmy Duncan	Mary Brown	Mary Dickens	SCM Daemon	Susan Green	То
	Documentation	11	5	0	14	0	3	0	0	0	
	Packaging	4	0	5	4	4	4	0	0	4	
	Software	15	13	7.5	17	7	6	0	1	0	6
	Total	30	18	12.5	35	11	13	0	1	4	12
ur	n by: Actual Time	(hrs)									
efr	esh Return Filte	rs Print P	age								

Sample matrix report summing issues

Column width on the report output

By default, the width of columns on browser output are not set, and the user's browser determines the width of each column using its own algorithms. Most of the time, this works well, but there are times when you might want to more accurately fix the width of the Y axis column titles being displayed on the output. Right-click on the red button by the field name you selected for the report, and one of the fields allows you to set the width of the column, measured in characters. This number is approximate, as browsers will sometimes override the number you set, particularly if you are displaying a large number of columns on the screen, relative to the width of the screen. Microsoft Word and PDF column width output are set using the same option. Note that you may also use the report option titled **Wrap Titles on Output** to assist in controlling the width of columns on the output. When you both set the width of a column and set the **Wrap Titles on Output** option, the column width setting takes precedence.

Multiple Field Breakdowns on Matrix Reports

You may select up to four fields on each axis of a matrix report, and ExtraView will automatically categorize the results. As an example, here is a report with two fields on each of the axes. The X axis is displaying Category within Business Area, and the Y axis is displaying Assigned To within Status.

			Bugs				Helpdesk		Total
Status	Assigned To	Documentation	Hardware	Packaging	Software	Fault in service	New Provision	Question	
	Bill Smith	1			1				2
	Chris Robinson				2				2
	George Miller		2		3		1		6
	Jimmy Duncan		1	3	5				9
New	Mary Brown			2	3				5
	Mary Dickens				2				2
	SCM Daemon			1					1
	Susan Green			1			1		2
	* None *					2	1	1	4
	Bill Smith		1		4				5
	Chris Robinson			1	2		1		4
	George Miller		1			1			2
	Jimmy Duncan			1	2		2		5
Open	Mary Brown				2		2		4
	Mary Dickens				1				1
	Sally Hunt		1						1
	Susan Green	1		1					2
	* None *					1			1
Total		2	6	10	27	4	8	1	58

Sample matrix report with 2 fields selected for each axis

Matrix Reports and Date Fields

Date fields have special properties when used on matrix reports. This helps you produce a variety of timebased reports, with the date fields being used on the X axis as column headings. The key properties are:

- You can group all the results for a time period. For example, you can group by week, or group by month, or group by year. Right-click the small red button at the left of the field name to popup a panel with this option
- You can select the same date field more than once for the X axis, then group the results. For example, you can group results by month within years, or by weeks within months within years Right-click the small red button at the left of the field name to popup a panel with this option
- The groupings may be made on calendar or fiscal time periods. There are also other groupings basing results on days of the month or week and on month and year starting and ending dates Right-click the small red button at the left of the field name to popup a panel with this option
- You can select up to four levels for groupings
- You can sub-total the results at any or all the grouping levels Right-click the small red button at the left of the field name to popup a panel with this option
- You can alter the format of the date field on the column heading. Select between Short, Medium and Long. As an example, the month of January will appear as J, Jan or January, depending on which format is selected Right-click the small red button at the left of the field name to popup a panel with this option
- You may check the box on the report editor to **Include columns with no data**. This will fill in periods with no data. For example, if you have a report where you want to display all the months of a year, but only some columns have data, you will still see a column header for each month of the year

Example

The objective is to prepare a report for last year, displaying sub-totals by quarter. The report will show the number of issues assigned to each person in each time period.

Run Report Save Report Save A	s Clear All Car	ncel Print Page			ExtraView Matrix Report ?
Matrix Report Options					
Report title					
Description					
Browser	~	Add Statistics to Report	🕐 🗹 Total 🗆 Percent 🗆 Mean	🗆 Min 🗆 Max	Display on Mobile ? 🗆
	_	Aggregation Method	👔 🖲 Count Issues 🔿 Sum Issue	S	Output Report Definition 👔 🗌
* Select Reporting Hierarchy * ~		Comparison	? * None * 🗸		Wrap Values on Output 🔁 🗆
			- None		
Select Fields to Form Matrix Re	port				
Fields Across Columns (X axis) 👔			Fields Down Rows (Y axis)	?	
Find a field	□ si	how field names	Find a field][Show field names
Committee Release	^ ■ Da	ate Created - Fiscal Year	Actual Renewal Date	^	Assigned To
Contract Date Contract Number		ate Created - Fiscal Quarter	Actual Time (hrs)		
Created from ID #		to Croated Month	Application		
Customer Contact	Re	eport output options for this fie	ld		
Customer Email		and an and that als			
Customer Name	Dis	splay sub-totals 🗆			
Date Closed		ternate Field Title			
Date Created		temate rield ritle			
Date Created					
Date of Last Status Change					
Due by Employee Department		ouping			
	V [N	Nonth 🗸		~	
Include columns with no data 👔 🗆					Sort on ? None *
Query Filters O Standard	Cor Fo	rmat		Use Allo	owed Values in Filters 👔 🗖
Advance		Nedium ~			ti-Valued Field Values ?
C Advanced					
Select Field		000	Tator Valac		
Select *		~			
Run Report Save Report Save A	s Clear All Car	ncel Print Page			

Note the following:

- The Date Created field was selected 3 times for the X axis
- Use the popup to group the first selection to Year, the second to Quarter and the third to Month
- On the Date Created Month popup, select the Display sub-totals checkbox
- Select the Assigned To field for the Y axis
- Use a query filter of Date Created during Last year to define the time period

This produces a report similar to the output below.

Date Created durin	ng Last	year															
Date Created, Dat	e Create	ed, Date	e Create	d vs. Assig	ned To												
								20	14								Total
			Qtr 1				Qtr 2				Qtr 3				Qtr 4		
	Jan	Feb	Mar	Sub-Total	Apr	May	Jun	Sub-Total	Jul	Aug	Sep	Sub-Total	Oct	Nov	Dec	Sub-Total	
Bill Smith						1		1									1
Chris Robinson	1			1						1		1					2
George Miller					1			1	1			1			2	2	4
Jimmy Duncan	3			3					1			1					4
Mary Brown													1			1	1
Mary Dickens	1			1									1		1	2	3
Susan Green	1			1													1
* None *							1	1	1	5		6	7			7	14
Total	6			6	1	1	1	3	3	6		9	9		3	12	30

Adding Statistics to Matrix Report Output

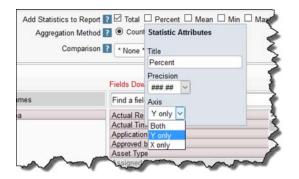
There are several options with the **Add Statistics to Report** checkboxes. You can elect to add Totals, the Percentage, the mean, the minimum, or the maximum to the report output. This may look similar to this:

un Report Save Report Save As Clear All	Cancel Print Page	ExtraView Matrix Report ?
latrix Report Options		
eport title		
escription		
Browser	Add Statistics to Report ? ☑ Total □ Percent □ Mean □ Min □ Max Aggregation Method ? ④ Count Issues ○ Sum Issues Comparison ? ▼ None * ✓	Display on Mobile ? Output Report Definition ? Wrap Values on Output ?

Using the Report Editor to Define the Statistics to be Added to the Report Output

You may click on each of the statistical methods, bringing up a popup window where you may alter the title of the column and set the decimal precision of the displayed results. You may also set whether to display the statistics on the X axis, the Y axis or both axes.

Also, note the select list directly beneath the **Fields Down Rows (Y axis)** field box. This offers the ability to provide an initial sort on the columns displaying the statistical output. You may sort any of the columns in an ascending or descending order when the report is first displayed. Once displayed, you may click on the column titles to resort the report.



Formatting the Statistical Output on the Report

	P 1	P 2	P 3	P 4	Total	%	Mean
Bill Smith	8	11	16	19	54	18.56%	13.5
Chris Robinson	1	4	24	1	30	10.31%	7.5
George Miller	3	16	24	8	51	17.53%	12.75
Greg Goldberg		3	9	4	16	5.50%	4
Jimmy Duncan	5	9	20	22	56	19.24%	14
Mary Brown	4	5	9	2	20	6.87%	5
Mary Dickens	1	3	4	3	11	3.78%	2.75
SCM Daemon		1	2		3	1.03%	0.75
Sally Hunt	5			2	7	2.41%	1.75
Susan Green	1	11	9	17	38	13.06%	9.5
太郎日本		1		1	2	0.69%	0.5
* None *		2	1		3	1.03%	0.75
Total	28	66	118	79	291	100.00%	72.75

Statistics on the YAxis of a Matrix Report

Aggregation Method

The default option is that the summary report produces a *count* of issues within each cell of the matrix. If you select the option to *sum* the issues, you are asked to select a numeric field. ExtraView will then sum the values within each cell, for the count of issues.

Display on Mobile

Check the option if you want the report to be available within mobile clients.

Output Report Definition

Checking this option displays the report selected options and fields along with the filters used at the end of the report.

Comparisons with Prior Periods

The report editor screen has an option that allows you to make a comparison of the results on your matrix report with either the prior period you have selected, or with the same period in the previous year. The output will then show three sections side-by-side; the results selected, the prior results and the difference. The time period against which the comparison is made is identified with a query filter. For example, if you set a query filter of **Date Created During Last Year** and select **Comparison equals Prior period**, then the report will display last year's data, plus the previous year's data plus a comparison of the two years.

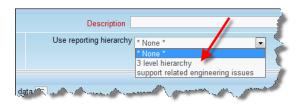
								2	013							Te	Isto								2014							1	latol		Comp	arison	
			Qtr 1				Qtr 2				Qtr 3			Qtr 4					Qtr	1			Qtr 2				Qtr 3			Qtr	4			Qtr 1	Qtr 2	Qtr 3	Qtr-4
	Jan	Feb	Mar	Sub-Total	Apr	May	Jun	Sub-Total	Jul	Aug	Sep	Sub-Total	Oct N	lov Dec	Sub-Tot	al		Jan F	ob M	r Sub-1	otal 📝	Apr M	ay Jun	Sub-Total	Jul.	Aug	Sep	Sub-Total	Oct	Nov De	c Sub-	lotal		Sub-Total	Sub-Total	Sub-Total	Sub-Total
Bill Smith	3	1		4													4						1										1	-4	1		
George Miller	2			2	1					1		1		1	1	1	4					1		1	1			1			2	2	4	-2	1		1
Mary Dickens	1	3		4	-										-		4	1			1				1				1		1	2	3	3			2
Total	6	4		10						1		1		1		1	12	1			1	1	1	2	1			1	1		3	4	8	.9	2		3

Notice that when making prior period comparisons, the report option to **Include rows with no data** is purposely enabled. This is to ensure that the same set of rows are displayed in the results and the prior results. If this did not happen, then it is entirely possible that the rows of data would not line up correctly when you view the report.

Comparisons with prior periods are not supported on matrix reports that have statistics added, on anything other than totals.

Hierarchical Summary Reports

If your administrator has defined hierarchies on which you can report, you will see an additional prompt on the report editor screen:



Reporting on hierarchies within matrix reports is similar to the way they are defined for column reports. The key difference is that you are only required to select the filters for each level in the hierarchy. These filters will be applied to each level of the hierarchy for the preparation of the data to be placed on the report. The report output will look very similar to a standard matrix report, except that the additional filters are applied.

Grouping on Multiple Levels of Hierarchical Filters

This feature produces a standard matrix report for the output, but allows you to group the results using filters at each level of the report hierarchies.

- As an example, we will utilize a hierarchy with 3 levels representing an organization that tests software. The organization creates *Test Plans* and *Test Cases*. Some subset of the available *Test Cases* are placed within a *Test Plan*, in a parent-child relationship. When *Test Cases* are executed, a *Test Result* is created as a child relationship of the *Test Case*
- To represent this, we have the following reporting hierarchies defined
 - Tests, which uses the relationship Test Plans --> Test Cases at the topmost level and Test Cases --> Test Results at the second level
 - Test Plans --> Test Cases as a single-level reporting hierarchy
- n Report Save Report Save As Clear All Cancel Print Page ExtraView Matrix Report ? ? Save / Upda Comparison ? * None * Select Fields to Form Matrix Report Fields Across Columns (X axis) 김 Fields Down Rows (Y axis) 💽 Show field names Find a field. Show field names Find a field Actual Renewal Date Date Created - Year Date Created - Monti Contract Number Actual Time (hrs) Report output options for this field Created from ID # Customer Contact Application Display sub-totals Customer Email Approved by Customer Nam Date Closed Asset Type Sort by (Sort direction) Date Created Automated Field values (Ascending) \sim Date Created Building Bus. Priority Date of Last Status Change Alternate Field Title Due by Business Area Employee Department Case Status Employee Name End Date Category Cell Phon Hierarchy Level Include columns with no data 👔 🗆 Include rows with no data Test Plan --> Test Case \sim Perform count on Perform Count on Perform Count on Perform Count on Performance Performanc Filter Multi-Valued Fie **Query Filters** Base level Select Field Operator Value 0 B Project(PROJECT) ~ equals \sim Test Plans \sim and and Date Created(DATE_CREATED) betweer Dec 31, 2014 12:00:(Test Plan --> Test Case Select Field Value Operator ÷ \sim ~ equals \sim Project(PROJECT) Test Cases Test Case --> Test Result Select Field Operator Value ÷ ~ ~ equals ~ Project(PROJECT) Test Results Run Report Save Report Save As Clear All Cancel Print Page
- Test Cases --> Test Results as a single-level reporting hierarchy

To prepare and run a matrix report that groups on multiple levels of hierarchical filters, perform the following steps:

- Create a new matrix report
- Select Condensed Query Filters
- Select Advanced Query Screen
- Select the report hierarchy titled *Tests*
- Select **Assigned To** as a field to display and group by. You group by this field by right-clicking on the red button by the field and selecting *Test Plan -->Test Case* as the hierarchy level
- Beneath the field list for the X axis, you see the *Perform count on* select list. Again, select the *Test Plan --> Test Case* entry. The important point is that this is the same hierarchy level that you chose in the last step
- Choose the base level query filters. E.g. select the filter **PROJECT = Test Plans** for the base level
- For the *Test Plan --> Test Case* level of the hierarchical filters, select the filter **PROJECT = Test**

Cases

- For the *Test Case --> Test Result* level of the hierarchical filters, select the filter **PROJECT = Test Results**
- Run the report.

Planning Reports

Planning reports will not work with all configurations, and require your data to be organized in a specific way. Your administrator may have turned off this feature if it's not appropriate.

The basic premise is that you have a controlling issue (i.e. a parent issue). This controlling issue will be in a relationship with a number of child issues, where each of the child issues has two date fields, signifying a start and an end time for an event. The use case is often that you have a project, and this project has an open-ended number of tasks, each scheduled to start and to stop at a specific time.

The Planning report allows the user to see many project records, and their tasks, all on a single report. The user can interact with the tasks on the report, allowing them to move the start or end dates of each task. The user can also drilldown into any task and update the fields on the task. This is shown in this screenshot:



Planning report output

The user interaction on the report allows the "grabbing" with the mouse, of a task, or the edge of a task. When the user moves the mouse, the entire event, or the start or end date will move. When the user releases the mouse button, the task is reset to the new time period. If the user clicks on a date within the grid and drags the mouse to another date, a window will popup, allowing the user to enter a new task for that time span. To set up a new planning report, the screen looks similar to this:

Run Report Save Report Save	ve As Clear All Cancel Print Page	ExtraView Planning Report ?
Planning Report Options		
Report title		
Description		
Output to Browser 🗸	Output Report Definition 👔 🗆	
500 rows per page		
* Select Reporting Hierarchy * 🔽]	
Select Fields & Formatting Op	Dptions	
Field to Use for the 1st Column of R	Row Titles 👔 * None *	
Field to Use for the 2nd Column of R	Row Titles 👔 * None *	
Field to Use for the 3rd Column of R	Row Titles 2 * None *	
Grid 1	Title Field ? * None * V Number of columns to display ? 30 V	
Starting Date / T		
Ending Date / T	Time Field 2 * None * Display color key using this field 2 * None *	~
Select Business Area for D	Drilldowns 👔 Customer Issues 🗸	
Select Project for D	Drilldowns 👔 Customer Support Issues Data 🗸	
Paren	ent ID Field 👔 * None *	
	Condensed Filters * Saved filter list * Use Allowed Values Expanded Filters Save / Update Filters ?	in Filters ? 🗆
Select Field	Operator Value	
* Select *	~	
Run Report Save Report Save	ve As Clear All Cancel Print Page	

Planning report setup

- Use reporting hierarchy You must choose a reporting hierarchy for a planning report. This will have been created by the administrator
- Fields to Use for Row Titles These are the fields on the parent issue that you will use for the titles to each row on the output
- Grid Title Field This field is used to provide the title that is displayed on each child issue
- Starting Date / Time Field This is the field on the child record that contains the starting time of the event
- Ending Date / Time Field This is the field on the child record that contains the ending time of the event
- Select Area for Drilldowns When the user double clicks on a child record, this is the Business Area that is selected in which to start the add issue operation
- Select Project for Drilldowns When the user double clicks on a child record, this is the Project that is selected in which to start the add issue operation
- **Parent ID Field** This is the name of the field in the child record that contains the pointer to the parent issue
- Number of columns to display The default is that the report will display 30 days worth of information. You may alter this to display between one and sixty days of information
- Show background grid Turns the background grid to the report off and on
- **Display color key using this field** As you can see in the above screenshot, there are two colors of blocks. These represent different values of the STATUS field in the different child records. The color key is shown above the grid.

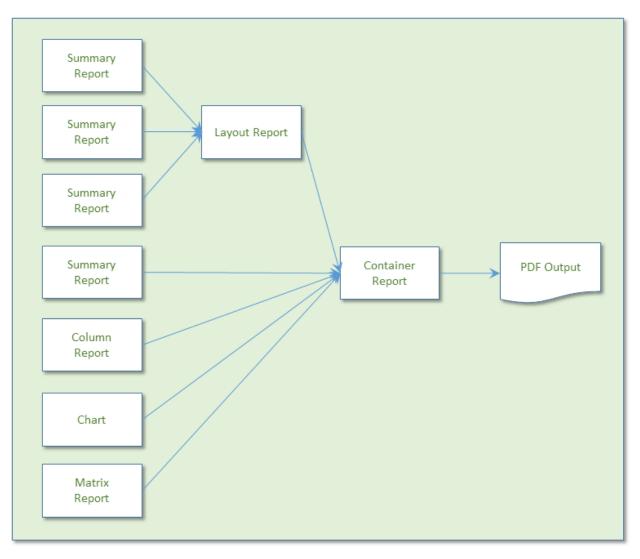
Report Layouts / Container Reports

Container Reports

Container reports are designed to output to the Adobe PDF format only. They do not output their results to any other format. Container reports are designed to allow more than one report to be placed into the output. Container reports are typically used to prepare a reporting pack where multiple individual reports are to be circulated. For example, you can place several reports and charts within a single PDF report. To achieve this, you place existing saved reports into a Container, and then run the Container with its indivudal reports.

A useful point is that you may schedule the Container report to be generated on a periodic basis and then distributed automatically to the appropriate users within your organization.

There is an alternative intermediate format called a *layout for an existing report*, These layouts may be used to embellish individual reports with styling and to further group individual summary reports into a single output These layout reports may also be placed into the container from which the PDF output file is created.



Sample process of preparing layout and container reports

Container reports also have other attributes that assist in the creation of professional reporting packs. For example, they have title pages for the report, and you may implement headers and footers throughout the

document you produce. The headers and footers may contain information such as page numbers and the date of production.

At their simplest, you can use the process to convert a single report or chart to a layout and then place it in a container as a method of outputting the report or chart to a PDF. At a more complex level, the container report may create a PDF that contains many reports that with traditional output must be output one at a time. Also, with the process described here, you can alter the style of many elements of the output, such as the font size and styling of the headers or data on the PDF output. A sample PDF report output over multiple pages may look like this:

Open Issues Fixed Issues		ns			3rd Colu	mn	4th Colun	n			
			Tracker		Tracker I	Enterprise	Tracker L	te	Total		
FDOOD ISSUES				2		1		1		4	
Closed Issue	6			21		7		3		1	-
Total	-		<u> </u>	3 26	<u> </u>	4	<u> </u>	<u>3</u> 7		0 15	1
			Г	20	-	1	÷	/		· · ·	-
Dura hu	0			0:							٦
	Category legend for t	the report				by layo	out				
1110 10 010	logona ion	no roport	Cocumenta	with 3	report	5	ging		Software		
Category							_	15	R 3	13]
											-
Open Iss	ues										
		T		Le	gend goes			Dave	Single	group	bv
ID #	Status		Title			Description	1	Days in Status	layout		
10475	Open	This is a Co reported by	the custon	ner when	issue. Her	e description re is the desc	ription of	75			
		they were pa into aissue #	erforming r #23232	research	this issue. of this issu	. Here is the o ue. Here is th	déscription]			
					description	n of this issue	a. Mele IS	-			_
repared by	/ Bill Smith					Column	Repor	t			
Open Iss					_		Repor	t			
Open Iss	ues		Tala	Le	gend goes	here		Davs in	Assigned	0.00	
			Title	Le	gend goes	here Description	-	t Days in Status	Assigned To	Owner	
Open Iss	ues		Title	Le	gend goes	here Description ption of this is	ssue. Here	Davs in	Assigned To	Owner	-
Open Iss	ues		Titlə	Le	gend goes the description of the	here Description ption of this is cription of this e description e is the desc	ssue. Here s issue. of this ription of	Davs in	Assigned To	Owner	
Open Iss	ues		Title	Le	the description of this issue. Here is the issue. Here is the issue. Here this issue. Here this issue of this issue.	here Description ption of this is cription of this e is the desc Here is the desc Here is the the	ssue. Here s issue. of this ription of description e	Davs in	Assigned To	Owner	-
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Open Iss	ues		Title	Le	the description is the description there is the issue. Here this issue. Here the description the description the description the description the description the description the description the description the description the description the description the description t	here Description ption of this is cription of this e description re is the desc Here is tha nof this issue ption of this e description re is the desc . Here is the desc . Here is the desc	ssue. Here s issue. of this ription of description e a. Here is ssue. Here is issue. of this ription of description	Davs in	Assigned	Owner	
Open Iss	ues		Title	Le	the description is the description there is the issue. Here this issue, Here of this issue, description the description the description the state. Here description the state. Here description the description	here Description ption of this is cription of this e description re is the desc Here is the of ue. Here is the of this issue ption of this is the description re is the desc ue. Here is the of this issue the description the description	ssue. Here s issue. of this ription of description e. Here is ssue. Here of this of this of this description e. Here is ssue. Here	Davs in	Assigned To	Owner	-
Open Iss	ues		Title	Le	the description is the description there is the issue, Her this issue, Her this issue, Her the description the description the scription the description the description the description the description the description	here Description ption of this is cription of this e description there is the desc Here is the desc ption of this issue ption of this is the description of this e description nof this is sue ption of this is cription of this is cription of this is cription of this is description	ssue, Here s issue. of this ription of description e a. Here is ssue. Here issue. of this ssue. Here issue. Here s issue. of this	Davs in	Assigned	Owner	-
Open Iss	ues		Titlə	Le	the description is the description Here is the issue. Here of this issue, description the description the description	here Description ption of this is e description of this e description re is the desc ue. Here is the cription of this is cription of this e description ue. Here is the ue. Here is the e description of this issue ption of this is e description of this is e description the desc Here is the desc . Here is the desc e description the desc the desc . Here is the desc	ssue. Here s issue. of this ription of description be s issue. Here s issue. of this ription of description be s issue. of this sue. Here s issue. of this sue. Here s issue.	Davs in	Assigned	Owner	-
Open Iss	ues		Title	Le	the description is the description this issue. Here this issue. Here this issue. Here this issue. Here is the description the description	here Description ption of this is cription of this e description re is the desc Here is the desc ption of this issue ption of this issue us. Here is the desc us. Here is the desc us. Here is the desc cription of this issue e description of this issue e description not this issue e description not this issue	ssue. Here s issue. of this ription of description e a. Here is ssue. Here s issue. of this ription of description b b. Here is ssue. Here s issue. of this ription of description e a. Here is a sue. Here s issue. of this ription of description e a. Here is	Davs in	Assigned	Owner	-
Open Iss ID#	Status		Title	Le	the description is the description the description	here Description ption of this is cription of this e description is the desc . Here is the desc ption of this issue ption of this is e description re is the desc . Here is the of description of this issue ption of this is reption of this is reption of this is e description the is the desc . Here is the desc	ssue. Here s issue. of this ription of description e s. Here is ssue. Here s issue. of this ription of description e a. Here is ssue. Here of this ription of description e e. Here is ssue. Here sue. Here	Days in Status			
Open Iss ID # 10454	Status	Test			the description the description there is the issue. Here this issue. Here this issue, description the description	here Description ption of this is cription of this e description re is the desc Here is the desc us. Here is the of this issue ption of this is the description of this e description re is the desc . Here is the description of this is cription of this is desc . Here is the desc . Here is the desc . Here is the desc . Here	ssue. Here s issue. of this ription of description e s. Here is ssue. Here s issue. of this ription of description e a. Here is ssue. Here of this ription of description e e. Here is ssue. Here sue. Here	Days in Status	George Miller	Chris	
Open Iss ID#	Status	Test This is a fau module			the description the description there is the issue. Here this issue. Here this issue, description the description	here Description ption of this is cription of this e description e is the desc . Here is the c ue. Here is the desc ption of this is e description of this issue ption of this is the description of this is the	ssue. Here s issue. of this ription of description e s. Here is ssue. Here s issue. of this ription of description e a. Here is ssue. Here of this ription of description e e. Here is ssue. Here sue. Here	Days in Status	George	Chris	
Open Iss ID # 10454	Status	This is a fau	it with the	Processor	the description is the description the state of this issue. Here is the issue, Here is the description the description the description the description the description the des	here Description ption of this is cription of this e description re is the desc Here is the desc us. Here is the of this issue ption of this is the description of this e description re is the desc . Here is the description of this is cription of this is desc . Here is the desc . Here is the desc . Here is the desc . Here	ssue. Here of this ription of description e a. Here is ssue. Here s issue. of this ription of description e b. Here is ssue. Here s issue. of this ription of description e e. Here is ssue. Here s issue.	Days in Status	George Miller	Chris Robinson Mary	-

PDF output of several report layouts

Single Group By Layouts

Single group by layouts are prepared by first designing one or more Summary reports, **each with a single field** as the object of the summary list. For example, you may prepare a Summary report using the **product_name** or the **area** field. Any filters may be applied to each of the reports.

Further, each of the summary reports may use a different field as its object. This will allow you to prepare a layout where each row or column of the layout represents a totally different variable being counted. Thus you can have different rows or different columns represent different information on a single report.

To prepare a Single Group By layout report, choose the **Create layouts for existing reports** from the **Query / Report Options** list and press the **GO** button. You will see the following screen:

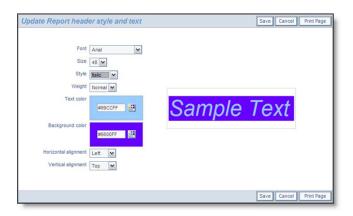
Report Layouts				Save	Report	Save As	Clear All	Cancel	Print Page
Single Group By Report									
Single Group By Report C Doul	ble Group By Report	Column Report	Chart C						
Report title			D	escription					
titles in by que	- Contraction of the Contraction	e group by query will a e report. You can then	ppear across the r select the query f	eport. If you se	Report 1 Title	der the titles in at will appear rt for each roo	n rows, the vi on the report w or column o	alues from t output from f the report	he group the list of
Queries to Group - Select at least	t one report								
Number of queries to include in group	1 💌								
Report 1 * Select a report *		6	 Title to d 	isplay for this	row				
Optional Report Headers									
Number of additional header rows to p Header titles for Row 1 Number Title text	lace above data 0 💌 er of titles 1 💌	Column spa	n 1 💌	R	ow 1 Hdr ow 2 Hdr itle text 1 1 t C C C C C	Title Title Title Title Col Col Col Col Col Title Title Title Title Title 123 123 1 1 1	7 Cole	le Title 3 123	
				Save	Report	Save As	Clear All	Cancel	Print Page

Preparing a single group by report

Note that the radio button selection at the top of the screen already reflects your choice of the Single Group

By report. To prepare the report:

- Decide whether the titles for each Summary report that is to be rendered are to be in the columns or rows of the report. Notice that the image that portrays the style of the report changes to represent your choice
- Within the field **Select query field to group by**, you will see a list of all the Summary reports that are possible to select. These will all be Summary reports that have a single field selected for the summary. These reports must all exist before you create the layout
- Enter the text for the report header and for the legend to appear under the header
- For each of the report header, the legend, the column header and the data display, you can set the style of the output by using the Δ button. When you hold your mouse over the button, you will see a summary of the style that is set. When you click on this button, you will see a pop up window where you can set the style



- There are options in the form of checkboxes that allow you to suppress empty columns and empty rows on the report output
- Next there is an option that you can check to automatically compute totals for the report. If you are rendering titles in Columns, then you will get column totals, if you are rendering the output in Rows, then you will get row totals on the output
- Next, you set the number of queries you want on your report. For each query, you will have a selection list from which to select the reports. Then you select the reports, and you select the title to display for each of the reports
- You are able to create complex, multi-line headers above the columns of data, using the capability in the **Optional Report Headers** section. You define the number of header rows, and then for each row you can define how many individual headers you require, and how many columns each of these will span. Please be careful to calculate these numbers accurately, as ExtraView does no checking and incorrect calculations will lead to strange-looking results. The diagram on the screen shows how the optional headers will appear
- When you have completed the screen, **Save** the report. Note that you cannot run the report directly; it must first be placed in a container report before you can run it and output it to a PDF.

Example Single Group By Report

First create and save three summary reports. Each of these has the **product_name** field (titled **Product**) as the selected field. For each of the three reports, select a single filter, as follows for each report:

• Status = Open

- Status = Fixed
- Status = Closed

You will now have three summary reports titled something like:

- Summary of Open Customer Issues
- Summary of Fixed Customer Issues
- Summary of Closed Customer Issues

Now we will place these fields onto the layout:

Report Layouts		Save Report	Save As	Delete Report	Clear All	Cancel	Print Page
Single Group By Report							
Single Group By Report Column	Report C	Chart C					
Report title Grouping of Status Reports		Description	Used as input	to a PDF container	report	Localize]
Select a query field to group your report by. titles in columns, the values from the group b by query will appear as rows on the report. reports shown below. Set the number of rep Render titles in Columns M Select query field to group by Product (PRODUCT_NAME) M Report header style and text Grouping different status reports togethe Legend text and style G Column header style G Remove empty columns C Remove empty rows C Calculate Totals V	y query will appe You can then sel orts to include in	ar across the report ect the query for ear	t. If you select ch row or colu hen choose the	to render the titles in mn that will appear of report for each rov Report Heade	r on the report of w or column of r ort 3 Report	lues from to output from f the report.	he group the list of
Data display style							
Oueries to Group - Select at least one report Number of queries to include in group 3 Report 1 Personal Summary of Open Customer Issues, By Product Report 2 Personal Summary of Fixed Customer Issues, By Product Report 3 Personal Summary of Closed Customer Issues, By Product	т	itle to display for thi itle to display for thi itle to display for thi	s row Fixed lss	ues			
Optional Report Headers							-
Number of additional header rows to place above data 1 💌 Header titles for Row 1 Number of titles 3 💌 Title text 🛆 Header over 2 Columns Title text 🔬 3rd Column Title text 🔬 4th Column	Column span Column span Column span Column span	1 💌	Row 1 Row 2 Title to Row T	Hdr #titles=7 ext Title text T Tale Tale Tale Tale Col Col Col Col Tale Tale Tale Tale Tale Tale text text text text the 123 123 13	rs=4 Col c	e Title 3 123	
		Save Report	Save As	Delete Report	Clear All	Cancel	Print Page

Sample Single Group By Report

Notice how we supplied the field to group by as **Product** and then set up three queries to include. Of course, these are the three summary reports we set up earlier in the example. For this example, we also set up some additional header rows as shown on the screenshots. If we save this, then include into a container report, and run the container report, we will see results similar to this:

Grouping of Status Re Sample Report	eports			
Grouping different	status reports togethe	r		
Header over 2 Columns		3rd Column	4th Column	
	Tracker	Tracker Enterprise	Tracker Lite	Total
Open Issues	2	1	1	4
Fixed Issues	21	7	3	31
Closed Issues	3	4	3	10
Total	26	12	7	45

Sample Single Group By Report

Double Group By Layouts

Double group by layouts are prepared by first designing a summary field, with two fields selected as the object of the summary list. For example, you may prepare a Summary report using the **Assigned to** and the **Product** fields. Any filters may be applied to this report.

To prepare a Double Group By layout report, choose the **Create layouts for existing reports** from the **Query / Report Options** list and press the **GO** button. After pressing the radio button **Double Group By Report** at the top of the screen, you will see the following:

Report Layouts				Save R	Report	Save As	Clea	ar All	Cancel	Print Page
Double Group By Report Single Group By Report	Double Group By Report	Column Report	Chart C							
Report title			Desc	cription						
Row title style Do not display empty columns Do not display empty rows Calculate Totals	* Select a report *	ith the first field rendered	as the columns and	the second fiel e matrix will be	ld rendere reversed	ed as the ro	ows of th		If you cho	
Optional Report Headers	-									
Number of additional header ro	Data display style						eader les=4 7 Title texc Col Co File Titl ext tex Col Co File Titl 123 12 123 12	le Title text ol Col le Title 3 123	n=2	
				Save R	Report	Save As	Cle	ar All	Cancel	Print Page

Preparing a double group by report

To prepare the report:

Update Report head	er style and text		Save Cancel	Print Page
Font Size Style Weight Text color	Arial V 48 V Halic V Normal V	Comple	Tout	
Background color	#99CCFF	Sample	Text	
Horizontal alignment Vertical alignment	Left 💌 Top 💌			
			Save Cancel	Print Page

Setting the style of an element on a PDF report

- There are options in the form of checkboxes that allow you to suppress empty columns and empty rows on the report output
- Next there is an option that you can check to automatically compute totals for the report. If you turn this on, then totals for both the rows and the columns of the report will be generated
- You are able to create complex, multi-line headers above the columns of data, using the capability in the **Optional Report Headers** section. You define the number of header rows, and then for each row you can define how many individual headers you require, and how many columns each of these will span. Please be careful to calculate these numbers accurately, as ExtraView does no checking and incorrect calculations will lead to strange-looking results. The diagram on the screen shows how the optional headers will appear
- When you have completed the screen, **Save** the report. Note that you cannot run the report directly; it must first be placed in a container report before you can run it and output it to a PDF.

Example Double Group By Report

First create and save a summary report. For our example, we create a Summary report with both **Assigned To** and **Status** selected. Now we will place this report onto the layout:

Report Layouts	Save Repo	ort S	ave As	Delete P	Report	Clear All	Cancel	Print Page
Double Group By Report								
Single Group By Report 🖉 Double Group By Report 🖉 Column Report 🧖 Cha	art 🕥							
Report title Assigned To By Status	Description	Asssig	ned To By	Status Gro	oup By Re	port	Localize	
Select a report. The list of possible queries are those summary q group by query will be a matrix with the first field rendered as th render the titles in rows as opposed to columns, the position of the Render titles in Rows Select report to run Personat Assigned To by Status, For a Group By Report	e columns and t	he second	d field rend	iered as the				
	ſ		Rei	port Hea	ader		1	
Report neader style and text Assigned To By Status Legend text and style			Field 2 Val 1	Field 2 Val 2	Field 2 Val 3	Field 2 Val 4		
Column header style		Field 1 Val 1	123	123	123	123		
Row title style		Field 1 Val 2	123	123	123	123		
Do not display empty columns		Field 1 Val 3	123	123	123	123		
Do not display empty rows	l	Field 1 Val 4	123	123	123	123		
Calculate Totals								
Data display style 🛕								
Optional Report Headers								
			tow 1 Hdr tow 2 Hdr		titles=4			
Number of additional header rows to place above data 0			Title text	Title text Title Title text tex Col Col Title Title	e Title Titte Titl	Title Title T text text t Col Col C Title Title T	itie ext Col itie	
			Row Title Row Title	123 123 123 123			23	
	Save Repo	ort S	ave As	Delete F	Report	Clear All	Cancel	Print Page

Sample Double Group By Report

Notice how we supplied the report to run as *Assigned To by Status* as the report to group the results in a matrix form. If we add total, and some style information, then save the report, then include into a container report, and run the container report, we will see results similar to this:

Sample Double Group By Report										
Assigned To By Status										
	New	Open	Fixed	Closed	Duplicate	Not Found	Total			
Bill Smith	1	2	24	4	1		32			
Chris Robinson	2		1				3			
George Miller		1	2	2		1	6			
Greg Goldberg			3	1		1	5			
Jimmy Duncan	6		10	6	1	5	28			
Mary Brown	2	2	2	2			8			
Mary Dickens			3				3			
Sally Hunt			4				4			
SCM Daemon			1				1			
Susan Green	1		11	12	5	1	30			
-	4		1				5			
Total	16	5	62	27	7	8	125			

Sample Double Group By Report

Column Reports as Layouts

Column reports as layouts are prepared by first designing the column report. The column report is any

column report that you create, with any filters.

To prepare a Column layout report, choose the **Create layouts for existing reports** from the **Query** / **Report Options** list and press the **GO** button. After pressing the radio button **Column Report** at the top of the screen, you will see the following:

Report Layouts					Sav	ve Report	t Sav	/e As	Clear All	Cancel	Print Page
Column Report											
Single Group By Report	Double Group By Report	Column Report 🕥	Chart C]							
Report title				Description]	
	Select a column report to run. Yo	ou may set a header and	style for the	report with th	ne remain	ning optio	ns.				
Select report to run	* Select a report *								~		
Report header style and text	Δ		1			Repo	rt Head	ler		i	
Legend text and style	A		-		itle text	Title te	title Title	text Title	Title text		
Column header style	-					text t	ext text Col Col Title Title	text	Title Title text text Col Col Title Title		
				R	ow Title			123	abc 123		
Row title style					ow Title			123	abo 123		
Data display style				L PR	ow Title	123 a	abo 123	123	abc 123		
Optional Report Headers											
				ſ			eport H				
					Row	1 Hdr 2 Hdr	#t #titles	itles=	4 Col epan Col epan		
Number of additional header rows	s to place above data o				Title	text T	itle text	Title			
					4	te O	tie Title ext text Col Col tile Title	Col Title	Title	ext Col	
					Row		tle Title 23 123			23	
				l	Row	Title 1	23 123	123	123 123 1	23	
					Sav	ve Report	t Sav	/e As	Clear All	Cancel	Print Page

Preparing a column layout

To prepare the report:

Update Report head	er style and text		Save Cancel Prin	t Page
Font Size Style Weight Text color	Arial V 48 V Raic V Normal V	Sample	Text	
Background color	#6600FF	Oumpic	ΤΟΛΙ	
Horizontal alignment Vertical alignment	Left 💌 Top 💌			
			Save Cancel Prin	t Page

Setting the style of an element on a PDF report

• You are able to create complex, multi-line headers above the columns of data, using the capability in the **Optional Report Headers** section. You define the number of header rows, and then for each row

you can define how many individual headers you require, and how many columns each of these will span. Please be careful to calculate these numbers accurately, as ExtraView does no checking and incorrect calculations will lead to strange-looking results. The diagram on the screen shows how the optional headers will appear.

• When you have completed the screen, **Save** the report. Note that you cannot run the report directly; it must first be placed in a container report before you can run it and output it to a PDF.

Example Column Layout

First create and save a column report. For our example, we created a Column report with several fields. Now we will place this report onto the layout:

Report Layouts	Save Report Save As Delete Report Clear All Cancel Print Page								
Column Report Single Group By Report Column	Chart C Description Open Issue Report Localize								
Select a column report to run. You may set a header and style for the report with the remaining options. Select report to run Public:My Open Issues, for Home Page Report header style and text Legend text and style Column header style Row title style Data display style M									
Optional Report Headers Number of additional header rows to place above data Report Header									
	Save Report Save As Delete Report Clear All Cancel Print Page								

Sample Column Layout

Note that we simply used the style buttons to embellish the column report output to the PDF. As a result, it looks like the following sample report.

Open Issues										
As of 6/12/2007										
Open Issues										
ID #	Business Area	Product	Module	Last Modified	Priority	Severity	Title			
10529	Helpdesk	Tracker		6/27/07 10:01 AM	P 3	Low	Authorization to provide a new computer for new employee - Tom Hogye			
10525	Helpdesk	Tracker		6/27/07 10:02 AM	P 3	Medium	Authorization to provide a new computer for new employee - Frank Bell			
10516	Helpdesk	Tracker		6/27/07 10.02 AM	Ρ3	Medium	Authorization to provide a new computer for new employee - Gloria Menendez			
10297	Bugs	Tracker Enterprise	Processor	4/10/07 3:28 PM	P 3	Low	This is a fault with the Processor module			
10475	Bugs	Tracker Enterprise	GUI	6/27/07 10:02 AM	Ρ4	Medium	This is a Coca-Cola issue reported by the customer when they were performing research into aissue #23232			
10353	Customer Issues	Tracker	Processor	4/16/07 11:53 AM			Need to know how exclusive or's are processed internally			

Sample Column Report

Charts as Layouts

Charts as layouts are prepared by first designing the chart in the standard way as explained in this documentation section. The chart is any that you create, with any filters.

To prepare a chart layout, choose the **Create layouts for existing reports** from the **Query** / **Report Options** list and press the **GO** button. After pressing the radio button **Chart** at the top of the screen, you will see the following:

Report Layouts				Save Report	Save As	Clear All	Cancel	Print Page
Chart Report Single Group By Report 🕥 Doub	ble Group By Report	Column Report	Chart 🕝					
Report title			Description	n				
Select chart to include * Sele Report header style and text Legend text and style Data display style		iy set a header and style	for the report with the re		ort Header			
			[Save Report	Save As	Clear All	Cancel	Print Page

Preparing a chart layout

To prepare the report:

pdate Report head	er style and text	Save Cancel Print Pag
Font	Arial	
Size	48 🗸	
Style	Italic 🗸 🗸	
Weight	Normal 💌	
Text color	#99CCFF	Sample Text
Background color	#6600FF	
Horizontal alignment	Left 💌	
Vertical alignment	Тор	
		Save Cancel Print Pag

Setting the style of an element on a PDF report

• When you have completed the screen, **Save** the report. Note that you cannot run the chart directly; it must first be placed in a container report before you can run it and output it to a PDF.

Example Chart Layout

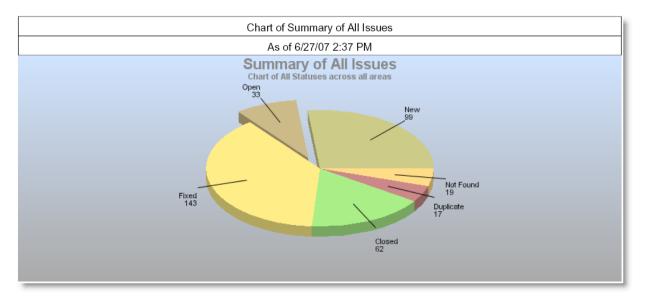
First create and save a chart. For our example, we created a pie chart with the title of **My Open Issues**. Then we place this chart onto the layout:

Report Layouts	Save Rep	ort	Save As	Delete Report	Clear All	Cancel	Print Page
Column Report							
Single Group By Report C Column Report	Chart C						
Report title Open Issues	Description	n Open	Issue Repo	rt		Localize	
Select a column report to run. You may set a heade	r and style for the repor	t with the	remaining o	options.			
Select report to run Public:My Open Issues, for Home Page					~		
Report header style and text Open issues			Rep	ort Header		i	
Legend text and style		Title	text Title	text Title text	Title text		
Column header style			Col Title	text text text Col Col Col Title Title Title	text text Col Col Title Title		
Row title style		Row			abo 123 abo 123		
Data display style		Row			abo 123		
Optional Report Headers	Ļ	_					
		r	_	Report Hea	dar		
			Row 1	Hdr #title	s=4 Col	span=1	
			Title to	IF CICES - /	-	e text	
Number of additional header rows to place above data 0			-	Title Title Title Title text	le Title Title ct text tex	e Title t text	
				Col Col Co Title Title Tit	e Title Title	Col Title	
			Row T		-		
		ļ	Row Ti	itle 123 123 12	3 123 123	123	
	Save Rep	oort	Save As	Delete Report	Clear All	Cancel	Print Page

Sample Chart Layout

Note that we simply used the style buttons to embellish the column report output to the PDF. As a result, it

looks like the following sample report.



Sample Chart as a PDF

Creating the Container Report

The objective a container report is to take one or more saved reports or layouts for existing reports, and combine them together on a single PDF as the output.

Saved reports are placed directly into the Container report. Layouts for existing reports are used to embellish a saved report before placing these within the Container report. For most purposes, placing the report directly within the Container provides clear and consistent presentation. The layouts allow the addition of styling information, enhanced headers and the ability to combine the output of dissimilar summary reports into a single layout.

When you select the **Create new container for existing reports** option from the **Report** screen, you will see a screen similar to the following:

Run Report Save Report Save As Clear All Cancel Print Page	ExtraView Report Container ?
Report Container Options	
Report Container Title	
Description	
Report Title	A
Report Legend	A
* Saved filter list * V ? Save / Update Filters	
Select Overall Page Settings - Used for PDF Output Only	
Page Size Letter V Orientation Landscape V Measurement inches V Headers / Footers on Cover Page ? Output Report Definitions ? Page Headers ? Left Center Select Reports to Place in Container	Left margin Report Report Bottom margin
Number of rows of reports 2 V Number of columns of	Performance of the second seco
* Select a report *	
Ignore Replacem	ent Filters
* Select a report *	vent Filters 2
Page Footers ?	Diabt
Left A Center	A Right
Advanced Options Run Report Save As Clear All Cancel Print Page	

Report Container Screen

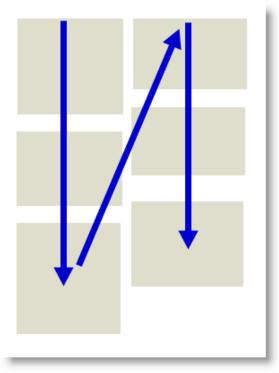
Update Report head	er style and text	Save Cancel Print Page
Font Size Style Weight	Arial V 48 V Raic V Normal V	
Text color Background color	#99CCFF	Sample Text
Horizontal alignment Vertical alignment	#6600FF	
		Save Cancel Print Page

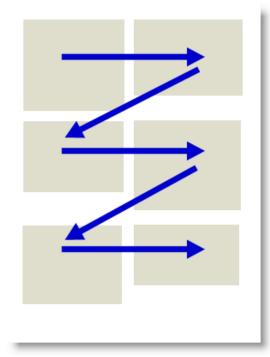
Setting the style of an element on a PDF report

• There is a button to the right of the **Report Container Title** that appears when you are editing an existing report. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful for

managing public reports

- The * Saved filter list * allows for the selection of filters to modify the replacement filters beneath the Advanced Options fold towards the bottom of the screen
- Within the Overall Page Settings, you can select the paper size, the orientation and the select from *inches* or *centimeters* as the measurement. Using this measurement, you may also set top, left, right and bottom margins of the PDF you will create. This section also allows you to place the Headers / Footers on the Cover Page as opposed to only showing these on the reports and allows you to output the report definitions at the end of the reports
- The **Page Headers** and the **Page Footers** allow you to set text and styles for the PDF headers and footers
- If you want to place the page number on a header or footer, use the tag \$\$PAGE_NUM\$\$. The full list of tags you can include within your titles, headers and footers is explained in the section Substitutable Field Values later on this page
- You can insert a line break into a header or footer with a
 tag
- In the section Select Reports to Place in Container, you first set how many reports across and how many reports down the page you want to render. These may be rendered by column or by row, giving a different layout on the PDF. Most of the individual reports within a Container use filters. At this time, it is important that all the individual reports use either standard or advanced filters only. You may not mix these within a single Container report





Rendering by row

Rendering by column

Note how the top of each report in the container is aligned according to whether you are rendering by column or by row. The number of selection boxes will change according to how many rows and columns of reports you will include in the container. Simply select the report you want to place at the appropriate place in the container

• You may place up to 100 reports within columns within the report, with a maximum of 3 columns

being displayed

• An example of the Container report output may look something like this:

				atuses on a PDF Rep DF Report is Generated	port			
Groupin	g differe	nt status r	eports together					
Header ov	er 2 Columi	ns		3rd Column	4th Colum	n		
			Tracker	Tracker Enterprise	Tracker Lit	te	Total	
Open Issues			2	1		1	4	4
Fixed Issues			21	7		3	3	1
Closed Issue	s		3	4		3	1	0
Total			26	12		7	45	
Bugs by	Category							
	Category legend for t	the report	Documentation	Hardware	Packaging		Software	
This is the		the report	Documentation 5	Hardware 3	Packaging	5	Software 3	3
	legend for t	the report	5			5		3
This is the Category	legend for t	the report	5	3		5 Days in Status		3 Owner

Sample Container report output as a PDF

Note: When you output a report to a PDF, and you see the message "**ERROR:Infinite table loop**", this indicates that there is too much data to fit horizontally on the output page. The most likely solution is to reduce the number of columns you are trying to place on the output page, or to reduce the font size of the output.

Substitutable Field Values

It is often useful to be able to substitute a value in the header, footer or legend of a Container report with the current value from the report. For example, you might prepare a report for a Product that is chosen at runtime, or you might want to put the current date onto the report metadata. To achieve this, you can use tokens, of the form \$\$FIELD_NAME\$\$ within the container report legend, footer or headers. There are several built-in tokens that you may use, as follows:

\$\$field_name\$\$	The value of the filter with the field name of <i>field_name</i>
\$\$SYSDAY\$\$	The current date
\$\$SYSDATE\$\$	The current date and time
\$\$PAGE_NUM\$\$	The current page number of the report

\$\$NUM_PAGES\$\$	The total number of pages in the report
<pre>\$\$HTML:<img height="yy" src="http://www.site.com
/image.png" width="xx"/>\$\$</pre>	This inserts an image that exists at the URL you specify into the output, with a width of xx and a height of yy
\$\$REPORT_ID\$\$	The unique report ID of the report being output within the Container, as stored in the database
\$\$CONTAINER_ID\$\$	The unique ID of the Container report from the database
\$\$CONFIDENTIALITY_MESSAGE\$\$	The text within the behavior setting named CONFIDENTIALITY_MESSAGE
\$\$USER\$\$	The name of the user creating the report

Advanced Options

When you click on this fold, you will see the following:

Adv	vanced Options			
Sele	ct Summary Report to Group Container Report Output ?			
	* Select a report *	~		
Runt	time Replacement Filters ?			Use Allowed Values in Filters ?
	Select Field	Operator	Value	
	* Select *	\sim		

Advanced Options

The **Select Summary Report to Group Container Report Output** option allows you to choose a saved summary report for a special purpose. ExtraView will take each row of this report and use it as input to the Container report as a runtime replacement filter, generating a copy of the container report for the list value returned in each row of the Summary report.

For example, you might want to prepare a container report which contains the same report numerous times, but using a different *Product* for each iteration of the report. If the Summary report returns 10 rows for 10 different products, then the Container report output will contain 10 sub-reports, each one filtered by a different *Product*.

The number of reports that can be produced by this iteration may be limited by your system administrator. If the report you produce is limited, there will be a message at the end of the report providing this indication.

Runtime Replacement Filters

Setting runtime replacement query filters on Container reports allow you to apply these filters to all the individual reports configured within the Container report. For example, you might want to apply the same date range to all the reports, or to select a single report as a filter for all the reports. Note that if any of the

reports contain a filter on a field used as a runtime replacement filter, then the filter at the individual report level is dropped completely and replaced with the runtime replacement filter for the field.

For example, you might want to apply a runtime replacement filter that applies the same date range to all the output, or apply a filter that provides only results from a specific product within the output.

When you specify runtime replacement filters within a Container report, they will replace filters for the same field within the individual reports that they contain. If a filter on a field specified at the Container level does not appear within the contained report, it will have no effect. Further, it is not possible to specify conjunctions for the runtime replacement filters - they simply replace filters for the same field within the contained reports. The runtime replacement filters are always displayed in expanded mode, allowing you to make multiple selections within a field.

Tip: A typical use case might be to create a Container report that contains several reports about all your products, but you want to filter on the report output by a single product. You cannot select a runtime replacement filter with a value similar to Product = Any, but you can select all the product values in the list and store that as your filter. Then, after viewing the Container report, you can select a new filter value that is either just one, or a selection of products.

For each report you select to display within the Container, there is a checkbox option, **Ignore Replacement Filters**. When selected, the replacement filters will not be used to prepare this report. This allows some reports to use, and some not to use, the replacement filters.

Summary Reports

When selected, this action creates a report where ExtraView will provide a count of the number of issues under different headings. Summary reports can be saved as personal or public reports. Examples include:

- A breakdown of how many issues have been fixed by each engineer in a given period
- The number of issues for each status, broken down by owner
- A breakdown by severity level of all open issues in the system

Using Summary reports, project or area managers can have a snapshot, at any time of the current overall project status. This sort of information is invaluable for producing internal status reports that are backed by real data.

You are able to select from any fields to which you have read permission, and which are able to be summarized. List values are those which are most commonly summarized. To prepare a new Summary report, choose the **Create New Summary Report** option. The screen presented to you will be similar to the following:

Run Report Sav	e Report Save	As Clear Al	I Cancel	Print Page			ExtraVie	ew Summary Re	port ?
Summary Repor	t Options								
Report title Report	t of Issues by Cat	tegory							
Description Voort	o Date								
Description Year t	o Datel								
Browser		and the second se		s to Report <mark>?</mark> 🗹 1 ith no Data ? 🗆	fotal 🗆 Percent 🛙	Mean 🗆	Min 🗆 Max	Display on Mo Output Report Defini	
* Select Reporting	Hierarchy * 🗸	inc		on Method ?	Count Issues 🔿 St	im Issues		Wrap Titles on Out	and the second se
Select fields to s	ummarize by d	louble-clicki	ng. Drag th	ne fields to rem	ove them from t	he list or o	change the ord	ler.	
Find a field			Show fie	ld names					
Actual Renewal Da	te	^	Category	1					
Actual Time (hrs)									
Application									
Approved by									
Asset Type									
Assigned To									
Automated									
Building									
Bus. Priority Business Area									
Case Status									
Category									
Cell Phone		~							
			Sort on ?	*None *					
Query Filters	O Standard Advanced	Condens OExpande		* Saved filter lis		>		ed Values in Filters alued Field Values	
	Select Field	10		oure r opuut		Operator		Value	
88	Business Area	(AREA)			~	equals	~	Customer Issues	~
and 🗸	Date Created(DATE_CREATE	ED)		~	during	~	This year to date	~
Run Report Sav	e Report Save	As Clear Al	I Cancel	Print Page				3	

Creating a new summary report

Options

- There is a button to the right of the **Report Title** that appears when you are editing an existing report. When you place your mouse over this button, you will see who created the report, who last updated the report and the dates when these actions occured. This is most useful for managing public reports
- There is an option in the preparation of Summary Reports, to Add Statistics to Report. The default option is to display the Total count. You can also elect to display the Percentages, Mean, Minimum, Maximum of the issues generated on the report
- The option **Include Rows with no Data** allows you to include rows within the results that had no results. Although this is not normally useful, consider the use case where you want to use the report as a target for issues that are going to be dropped on the report. Including zero rows on the report allows you to drop issues onto reports that have no value up to the time you drop the issues
- The **Aggregation Method** allows you to either produce a summary report that counts the number of issues within each row of the report, or accumulates the total of a numeric field within the row of the report. If you choose to *Sum Issues*, then a list of all the numeric fields appears. Choose the field you want to total on the report output
- The Display on Mobile button will allow the report to appear on a mobile phone or tablet
- The **Output Report Definition** button places the options and filters used in the production of the report at the end of the output
- The option to **Wrap Values on Output** changes the default presentation of values within fields. The default presentation is that the values are displayed on a single line without line breaks, even though

the value contains more than one word. If you enable this option, the text values used as row headings will be wrapped. This is useful if you are summarizing long text values. This is not a frequent use case, but when needed, this option improves the readability of the report

• If your administrator has enabled the option that allows you to search for users that have been disabled, you will see a checkbox option that allows you to **Show Inactive Users**. When you click in the checkbox, the screen will refresh and all user lists will show inactive as well as active users. Note that this option only works with the Standard Query screen, and does not work with the Advanced Query screen.

Selecting columns to summarize and display

- Select the columns that you require on your report, by double-clicking on each field name. If you want to alter the order of the fields being summarized on the report, you can click on a field in the right-hand box and drag it to a new position. To remove a field from the report, drag it out of the box
- You can choose from one to ten columns to summarize on a single summary report
- The value columns and the relevant statistical columns may be sorted by clicking on their title
- Note the red button to the left of the fields that you have selected to summarize. Right-click on this and a small window will appear where you can set other options for the field. These options are different according to the display type of the field. They include:
 - \circ The ability to display sub-totals for the field
 - The ability to select the initial sort order of the field on the report output, ascending or descending. You can also sort by the sub-totals as opposed to sorting by the initial values
 - $\circ~$ The ability to display an alternative title for the field
 - $\circ~$ The ability to set the width of the field on the output
 - For date fields, you can group the results in a variety of means, for example by week, or by fiscal quarter

Assigned To in Bill Smith	; Chris Robinson; I	Mary Brown and Bu	siness Are	a in Bugs; Test Case Management; Helpdes
Business Area 🔺		1761	Total =	
Bugs	Category A Documentation	Assigned To ▲ Bill Smith	10tal - 2	
Duys	Documentation	Chris Robinson	6	
	Packaging	Bill Smith	4	
	rackaging	Chris Robinson	1	
		Mary Brown	3	
	Software	Bill Smith	21	
	Continuito	Chris Robinson	4	
		Mary Brown	6	
	* None *	Bill Smith	5	
		Chris Robinson	1	
		Mary Brown	3	
	Sub-Total	-	56	
Test Case Management	* None *	Bill Smith	5	
		Chris Robinson	1	
		Mary Brown	8	
	Sub-Total		14	
Helpdesk	New Provision	Bill Smith	2	
		Chris Robinson	1	
		Mary Brown	2	
	* None *	Bill Smith	2	
		Chris Robinson	2	
		Mary Brown	1	
	Sub-Total		10	
Total			80	

Sample summary report

repared by Bill Smith or	April 25, 2016 10:	59:23 PM PDT				
ssigned To in Bill Smith	Chris Dobinson:	Jan Brown and Bu	cinoce Aro	a in Buge: Tee	t Casa Ma	anagament: Help
ssigned to in Dir Omitin	, onna reounson, r	viary brown and bu	Silless Ale	a in Dugs, res	Cose Me	magement, rieip
usiness Area 🔺	Category 4	Assigned To A	Total =	Percent =	Mean	
ugs	Documentation	Bill Smith	2	2.50%		
		Chris Robinson	6	7.50%		
	Packaging	Bill Smith	4	5.00%		
		Chris Robinson	1	1.25%		
		Mary Brown	3	3.75%		
	Software	Bill Smith	21	26.25%		
		Chris Robinson	4	5.00%		
		Mary Brown	6	7.50%		
	* None *	Bill Smith	5	6.25%		
		Chris Robinson	1	1.25%		
		Mary Brown	3	3.75%		
	Sub-Total		56	70.00%	5.1	
est Case Management	* None *	Bill Smith	5	6.25%		
		Chris Robinson	1	1.25%		
		Mary Brown	8	10.00%		
	Sub-Total		14	17.50%	4.7	
elpdesk	New Provision	Bill Smith	2	2.50%		
		Chris Robinson	1	1.25%		
		Mary Brown	2	2.50%		
	* None *	Bill Smith	2	2.50%		
		Chris Robinson	2	2.50%		
		Mary Brown	1	1.25%		
	Sub-Total		10	12.50%	1.7	
otal			80	100.00%	4.0	

Sample summary report with statistics

Column width on the report output

By default, the width of columns on browser output are not set, and the user's browser determines the width of each column using its own algorithms. Most of the time, this works well, but there are times when you might want to more accurately fix the width of the Y axis titles being displayed on the output. Right-click on the red button by the field name you selected for the report, and one of the fields allows you to set the width of the column, measured in pixels. This number is approximate, as browsers will sometimes override the number you set, particularly if you are displaying a large number of columns on the screen, relative to the width of the screen. Microsoft Word and PDF column width output are set using the same option. Note that you may also use the report option titled **Wrap Titles on Output** to assist in controlling the width of columns on the output. When you both set the width of a column and set the **Wrap Titles on Output** option, the column width setting takes precedence.

Summary Reports and Repeating Records

If you prepare a summary report, and include one or more fields from the repeating record as any the fields that is to be summarized, then it is possible (indeed probable) that an individual record will be summarized into more than one line of the summary report that is displayed.

This works without problem, and you can drill down from an individual line of the report to see the issues that made up the total for the line. The totals for the displayed summary report will be accurate totals of the lines of the report. If you drill down into the total and grand total lines of the displayed summary report, the issues that were included on different lines of the summary report are not repeated as this would be confusing. However, this does lead to the possibility that there will be fewer issues on the drill-down report than appear in the total of the summary report.

For example, you may see a grand total of 135 issues on a summary report, but when you drill down into this total, there may only be 125 issues displayed. This probably indicates that 10 of the issues rightfully appeared in two rows of the summary report.

Summary Reports and Date Fields

Date fields are stored within ExtraView, with the time component accurate to the nearest millisecond. Therefore, if you want to summarize on a date field, you should recognize that the count of issues with the identical date is likely to be one! This may be a little surprising at first, but it is accurate. ExtraView provides alternative methods for summarizing on date fields, so you can answer questions such as "How many issues were opened by each support technician on a given day"? Inbuilt date fields such as "Date Created" have an alternative form, which is the truncated version of the date, i.e. with no time component. If your administrator has given you access to these, then summarizing on this will give a total account within a day. Also, if your administrator configured a date field such that the time component is ignored, then the fields will summarize by the complete day.

If you summarize on a normal date field, the behavior also depends on your personal time format, stored within your personal information. If you have a date format that includes the time within the day, the report will most likely show you a single row for each date entry, with a count of 1. The date displayed on each row will show the time. If your personal date format does not include time, then all the date values are consolidated onto a single label for all the rows of the report, and you will still see one row for each date within the report.

Displaying Only the Top Summarized Results

It can be useful when displaying a summary report to only display the most significant results. For example, a summary report may display 100 rows, but you might only be interested in the ten rows with the highest values. To achieve this, there is filter that is normally used in conjunction with the advanced query mode, titled **Top-n rank filter**. For the above example, if you set the filter to **Top-n rank filter less than or equal to 10**, then only the ten highest values will be displayed. If you set the filter to be **Top-n rank filter equal to 3** only the third highest value will be displayed. Note that this feature is not supported on all databases.

If your installation is utilizing MySQL or Apache Derby as its underlying database, then this feature is inoperable.

Hierarchical Summary Reports

If your administrator has defined hierarchies on which you can report, you will see an additional prompt on the report editor screen:

Browser	~	Add Statistics to Rep
* Select Reporting Hierarchy *		Include Rows with no D Aggregation Me
Customers>Issues Helpdesk> Facility Issues Test Case> Test Result	double-clicki	ng. Drag the fields to remove
Test Plans> Test Cases Testing Actual Time (nrs) Application	^	Business Area Category Assigned To

Reporting on hierarchies within summary reports is similar to the way they are defined for column reports. The key difference is that you are only required to select the filters for each level in the hierarchy. These filters will be applied to each level of the hierarchy for the preparation of the data to be placed on the report. The report output will look very similar to a standard summary report, except that the additional filters are applied.

Grouping on Multiple Levels of Hierarchical Filters

This feature produces a standard summary report for the output, but allows you to group the results using filters at each level of the report hierarchies.

- As an example, we will utilize a hierarchy with 3 levels representing an organization that tests software. The organization creates *Test Plans* and *Test Cases*. Some subset of the available *Test Cases* are placed within a *Test Plan*, in a parent-child relationship. When *Test Cases* are executed, a *Test Result* is created as a child relationship of the *Test Case*
- To represent this, we have the following reporting hierarchies defined
 - Tests, which uses the relationship Test Plans --> Test Cases at the topmost level and Test Cases --> Test Results at the second level
 - Test Plans --> Test Cases as a single-level reporting hierarchy
 - Test Cases --> Test Results as a single-level reporting hierarchy

Run Report Save Report Save As Clea	r All Cancel Print Page	ExtraView Summary Report ?
Summary Report Options		
Report title		
Description		
	Add Statistics to Report 👔 🗹 Total 🔲 Percent 🛛	
Testing Inc	Iude Rows with no Data 2 Aggregation Method 2	Output Report Definition ? um Issues Wrap Values on Output ?
Select fields to summarize by double-cl	icking. Drag the fields to remove them fro	om the list or change the order.
Find a field	□ Show field names	
Actual Renewal Date	A Assigned To	
Actual Time (hrs)	Report output options for this field	
Application	-	
Approved by Asset Type	Display sub-totals	
Assigned To	Sort by (Sort direction)	
Automated		
Building	Field values (Ascending)	
Bus. Priority		
Business Area	Alternate Field Title	
Case Status	-	
Category Cell Phone	~	
1. PU. PUILUE	Hierarchy Level	
Dedam count on a	Test Plan> Test Case	
Perform count on ? Test Plan> Test Case	× L	
Query Filters O Standard O Conde	ensed Filters * Saved filter list *	Use Allowed Values in Filters ?
	ded Filters	Filter Multi-Valued Field Values ?
	Save / Update Filters ?	
Base level		
Select Field	Operator	Value
Project(PROJECT)	✓ equals	V Test Plans V
Test Plan> Test Case Include parents with	out children ? 🗆	
Select Field	Operator	Value
Project(PROJECT)	✓ equals	✓ Test Cases ✓
Test Case> Test Result Include parents with	thout children 👔 🗆	
Select Field	Operator	Value
Select *	~	
Run Report Save Report Save As Clea	r All Cancel Print Page	

To prepare and run a summary report that groups on multiple levels of hierarchical filters, perform the following steps:

- Create a new summary report
- Select Condensed Query Filters
- Select Advanced Query Screen
- Select the report hierarchy titled Tests
- Select **Assigned To** as the field to summarize and group by. You group by this field by rightclicking on the red button by the field and selecting *Test Plan -->Test Case* as the hierarchy level
- Beneath the field list, you see the *Perform count on* select list. Again, select the *Test Plan --> Test Case* entry. The important point is that this is the same hierarchy level that you chose in the last step
- Choose the base level query filters. E.g. select the filter **PROJECT = Test Plans** for the base level
- For the *Test Plan --> Test Case* level of the hierarchical filters, select the filter **PROJECT = Test** Cases
- For the *Test Case --> Test Result* level of the hierarchical filters, select the filter **PROJECT = Test Results**
- Run the report.

Taskboard Reports

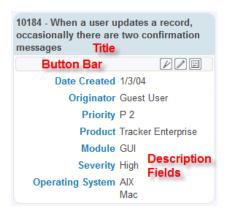
Taskboard reports are designed to offer a matrix of issues on a display. The axes may be any enumerated list type field. For example, you might have **Assigned To** on one axis and **Status** on the other axis. Issues are displayed within tiles on the report output. You decide which fields are to be placed on the report, both in a title area, and within the description area of the tile. The key attribute of the taskboard report is that you can drag individual tiles from one location on the report, to a different area. Using the example above, this means you can drag an issue with a specific **Assigned To** value and a specific **Status** value and drop it on another area of the report, thereby updating either the **Assigned To** or **Status** value, or both values at one time.

efresh	Return Print Page			
ck to Free	ze / Unfreeze Row & Column Titles			
	New	Open	Fixed	Closed
Bill	10627 - This is a sample incident	, in the second s	10514 - This is a Coca-Cola issue reported	10184 - When a user updates a record,
Smith			by the customer when they were	occasionally there are two confirmation
			performing research into aissue #23232	messages
	Module * None *			
	Date Created 5/2/12		Module * None *	Module * None *
	Originator Bill Smith		Date Created 4/12/07	Date Created 1/3/04
	Priority P 3		Originator Bill Smith	Originator Guest User
	Product Tracker Enterprise		Priority P 2	Priority P 2
	Module API		Product Tracker Enterprise	Product Tracker Enterprise
	Severity Low		Module GUI	Module GUI
	Operating System		Severity * None *	Severity High
			Operating System	Operating System AIX Mac
			10297 - This is a fault with the Processor module	indo
			Module * None *	
			Date Created 4/12/05	
			Originator Bill Smith	
			Priority P 3	
			Product Tracker Enterprise	
			Module Processor	
			Severity Low	
			Operating System	
Chris Robinson	10620 - Software issue reported by Customer			10207 - Customer reports seeing duplicate messages after adding a new record
	Module * None *			Module * None *
	Date Created 5/1/12			Date Created 12/27/04
	Originator Bill Smith			Originator Susan Green
	Priority P 3			Priority P 4
	Product Tracker Enterprise			Product Tracker Enterprise
	Module GUI			Module GUI
	Severity * None *			Severity Low
	Operating System			Operating System
George Miller	10326 - update times right away!	10475 - This is a Coca-Cola issue reported by the customer when they were	10205 - When the user presses the Go button on the Confirm screen, the	10199 - Have wings will fly, that's what they say
		performing research into aissue #23232	software takes 2 seconds to respond	
	Module * None *		before you see the next page	Module * None *
	Date Created 4/27/05	Module * None *		Date Created 1/5/04
	Originator Bill Smith	Date Created 2/23/07	Module * None *	
	Priority P 1	Originator Bill Smith	Date Created 12/27/04	Originator Susan Green
	Product Tracker Enterprise	Priority P 4	Originator Bill Smith	Priority P 3
	Module API	Product Tracker Enterprise	Priority P 2	Product Tracker Enterprise
	Severity Low	Fround tracker Enterprise	Product Tracker Enterprise	Module API

Taskboard Report Output

With the above screenshot, you can use your computer's mouse to drag the issue represented by the tile in the top left-hand corner of the report and drop it elsewhere. This issue has values of *Bill Smith* for the

Assigned To and *New* for the Status field. When you drop the issue in another row and column, the values for the Assigned To and Status are immediately updated to those of that row and column. If the update triggers additional rules, then a popup window appears, asking for values to satisfy these rules. For example, you might need to provide a Comment when you update an issue's Status from *Open* to *Fixed*, so the popup would ask you for a value for the Comment field.



Taskboard Tile

The Taskboard Report Editor

Run Report Save Report Save As Clear Al	I Cancel Print Page		ExtraView Taskboard Report ?
Taskboard Report Options			
Report title			
Description			
Output to Browser 🖌		Output Report Definit	ion 🔋 🗆
Select 1 to 4 Fields On Either Axis to Form	the Report		
Choose fields to be display		Choose fields to be displa	yed on the side axis ?
	Show field names	Find a field	Show field names
Application	Status	Application	 Assigned To
Approved by		Approved by	
Asset Type		Asset Type	
Assigned To		Assigned To	
Automated		Automated	
Building		Building	
Bus. Priority		Bus. Priority	
Case Status		Case Status	
Category		Category	
Customer Name		Customer Name	
Customer Select Tabs		Customer Select Tabs	
Floor Number		Floor Number	
Installed OS	·	Installed OS	v
Select at Least One Field to be Displayed	as the Title and as the Description	n	
Title Field	s ?	Description	Fields ?
Find a field	Show field names	Find a field	□ Show field names
Test Case ID	ID #	Notepad	∧ ■ Module
Test Case ID Test Case ID	Title	Notes	Date Created
Test Case Keywords		Notes	Originator
Test Plan Approver		Number of Attachments	Priority
Test Plan Complete Approver		Occurrence	Severity
Test Plan Complete Date		Operating System	Operating System
Test Plan ID		Originator	Quickedit Button
Test Plan Name		Other Application	Edit Button
Tested In Build		Other Info	View Button
This is the 3rd fold		Owner	
Time on call		Parent ID #	
Title		Parent Issue	×
		Parent Issue	•
		Display Fields OButtons	
		ar list *	
O Standard O Co	ondensed Filters * Saved filter		
Query Filters Advanced O Ex	kpanded Filters		lowed Values in Filters ? 🗆
	Save / Upo	late Filters ?	
Select Field		Operator Value	
Business Area(AREA)		v equals v Bugs v	
and V Status(STATUS)		✓ equals ✓ New ✓	
Run Report Save Report Save As Clear Al	I Cancel Print Page		

Taskboard Report Editor

- Provide a title for the report
- Provide a description for the report
- Note that the only valid output option is your browser
- Like all other report types, you may use Condensed or Expanded query filters
- Like all other report types, you may use the Standard or Advanced query mode
- You may select a reporting hierarchy for the filters. When you choose a hierarchy, you will see query filters for each level of the hierarchy
- Select from one to four fields to use to set the top axis of the report. The valid fields to choose from are all of the various list types within your installation. When you choose more than one field for the axis, you will see the tiles will appear on the report output within new sections that are created within each field. Note that multi-valued list fields may not be placed on axes
- Select from one to four fields to use to set the side axis of the report. The valid fields to choose from are all of the various list types within your installation. When you choose more than one field for the axis, you will see the tiles will appear on the report output within new sections that are created within each field

- Choose the fields to display within the title of each tile. Typically you will only choose one or two fields such as the issue ID and the Title of the issue
- Choose the description fields to place within the body of each tile on the report output. Note that you may also choose various buttons to place on the output. All the buttons you select are gathered together and placed in a mini-button bar under the title of each report tile
- Choose the filters for your data. It is possible to create a vast number of cells on your report output if you do not provide reasonable filters for the data. Your administrator will have set some limits as to how many tiles you can place on a report. Obviously, a report that has tens of thousands of tiles becomes unworkable and virtually impossible to navigate
- In the usual way, run or save your report

Editing Fields on a Taskboard Tile

There are several ways in which you can alter values within a Taskboard tile. In order to be able to edit an issue, you must have permission, and in order to be able to edit a field within an issue, you must have permission to write to that field:

- Drag the tile and drop it within a different row and column of the report. This will update the values within the issue to those that appear on the title of the row and column
- Double-click on a field within the description area of a tile. This allows you to update a single value within the field on the tile. Note that if this field is also a field on one of the axes of the report, then the tile will be moved to the appropriate row and column of the report. If you use double-click to initialize the edit operation, you use the enter key within a text field to complete the edit. With a list field you simply select the new value. If you want to cancel your edit, then use the **Escape** key on your keyboard. The report will not allow you to edit values that are read-only, or fields to which you do not have write permission
- Use the Quickedit button to allow the editing of all the fields on the tile at one time. You will also see an **Update** and **Cancel** button appear within the button bar as controls. Note that you cannot use Quickedit on more than one tile at a time
- Use the Edit button on the button bar to enable a popup window with the entire record available for editing and updating.

Quickedit Mode - Direct Inline Editing

A button with the label **Qedit** or similar may appear on columnar reports and on Quicklist reports. This is the report Quickedit mode. When this is pressed, you can edit the record on the report directly. This is a very fast and efficient means of updating many records in succession. For example, if you have a weekly status meeting where you review many issues and make changes to details such as priorities and who an issue is assigned to, then the Quickedit mode is very useful.

			eport						R	efresh Group Issues Update Issues Return Print Pa
										Records 1 to 20 of 385
epared	by Bill	II Smith on	1/28/08 2	2:46 PM						
									0	-
1		and a	ID # =	Business Area	Product =	Module	Last Modified	Priority =	Severity =	Title -
ew Edi	_	Qedit	10571		ker	GUI	10/24/07 1:20 PM	P1	High	Here is the title of the issue
ew Edi	_	Qedit	10337	U.	ter		12/11/07 2:08 PM	P 1	Low	This is a demo of P4 interface
ew Edi	_	Qedit	10325	Bugs	ker		12/11/07 2:08 PM	P 1	Low	update times right away!
ew Edi	it i	Qedit	10323	Bugs	Tracker	GUI	12/14/07 12:17 PM			new java file changes
		opdate	ID #	Business Area	Product	Module	Last Modified	Priority	Severity	Title
		Cancel	10278	Bugs	Tracker 💌		12/11/07 2:07 PM	P1 💌	* None * 🛩	User requests information on how to format text
ew Edi	e 1	Qedit	10272	Bugs	Tracker	GUI	12/14/07 12:49 PM	D 1		This will be mapped to EV
ew Edi	_	Qedit	10272	Bugs -		Database		P1	Low	Customer server is down and requires immediate attention
ew Edi	_	Qedit	10250		Quickedit buttons	Database	12/11/07 2:08 PM		Medium	Problem with the GUI widget
ew Edi	_	Qedit	10234	Bugs	Quickedit buttons		12/11/07 2:07 PM		Wediditt	This is a new job
ew Edi	_	Qedit	10241	Buge	Tracker		12/11/07 2:08 PM			I have a problem with this computer
ew Edi	_	Qedit	10239	Bugs	Tracker		12/11/07 2:07 PM			This will become the title in ExtraView
ew Edi	_	Qedit	10200	Bugs	Tracker			P1		This is a new issue entered about the need for web searches
ew Edi	_	Qedit	10237	Bugs	Tracker	Database		P1	High	This is a new job in P4 being mapped to EV
ew Edi	_	Qedit	10236	Bugs	Tracker	Databato	12/11/07 2:08 PM	P1		When the administrator logs in, he will see a new report
ew Edi	_	Qedit	10229	Bugs	Tracker		7/3/07 8:24 AM	P1		Here is the title for all to see
ew Edi	_	Qedit	10228	Bugs	Tracker		1/27/05 10:09 PM	P1		Here is the title for ExtraView
ew Edi	_	Qedit	10227	Bugs	Tracker		1/27/05 9:55 PM	P1		Problem with flat buttons
ew Edi	lit	Qedit	10226	Bugs	Tracker		12/11/07 2:08 PM	P 1	Low	Provision of TNCP problem
ew Edi	it	Qedit	10189	Bugs	Tracker Enterprise	GUI	4/10/05 9:01 PM	P 1	Low	Build it and they will come
ew Edi	it	Qedit	10101	Bugs	Tracker Lite		6/30/04 1:07 PM	P 1	Low	A single swalow does not a spring make
	_			0						

Report Quickedit mode

When you press the **Qedit** button, you are able to edit the fields that appear on that row of the report. This is often much speedier than going into the edit mode of the issue. When you are in the Quickedit mode, you must exit by either updating the issue, or canceling the update. There are some caveats using the Quickedit function, as follows:

- You must have write access to a field in order to update its value
- The administrator must have placed the field on the edit layout for the appropriate business area and project in order to update its value. If the field is part of the issue and not on the layout, you may still see it in a read-only mode
- If you see '-' where you expected to see a field you wish to edit, it is because the field is not an ExtraView built-in field and it has not been placed on the *edit* screen layout by your administrator. This happens when your user record is currently in one Business Area and Project, but the record you are trying to edit resides in a different Business Area or Project, and does not have that field
- Calculated fields such as Days Open and Days in Status will be displayed as read-only
- If a field has a link, using the "Display as URL" function, this link is not active when in Quickedit mode
- You cannot ever edit the Business Area or the Project field in Quickedit mode
- Radio button fields are displayed as single-select list fields to conserve space on the screen
- If you are using repeating rows, you may edit the values on a row, but you cannot add a new row
- All allowed value relationships are maintained. However, if the parent value is not on the report, you may only select a new child value within the current parent value
- Quickedit mode does not operate within a report displaying the results of a hierarchical report. This is because these reports display multiple issues on a single row
- All business rules will be executed in the same way as if you were using the full edit mode on the issue. This means that if your edit in Quickedit mode triggers a rule that makes a field required, and this field is not on the report, then a popup window will appear and ask you to complete the missing value. It is not possible to bypass the rule and update the issue. If there is a "chain" of required

fields, within one being dependent upon another, then you may see more than one popup window until you satisfy all the rules

- If you have any image or document display type fields on your report that are subject to being visible or required according to a condition on its *edit* layout, then the report cannot be used with Quickedit. Under this circumstance, you will see a dialog box that informs you that you should use the normal edit mode.
- All issue notifications will be sent out as normal.

Calculated Fields

Not every filter that can be used or field that can be displayed is a field with data explicitly entered or updated by the user. For example, ExtraView will automatically calculate the values for fields defined internally. These fields and their meanings are:

Field Name	Default Title	Purpose
DATE_CLOSED	Date Closed	The date and time the issue was closed.
DATE_CLOSED_MONTH	Date Closed Month	The month the issue was closed (useful when summarizing information)
DATE_CLOSED_SINCE	Days Since Closed	The number of days since the issue was closed. Days are calculated using your own time zone, back to midnight for the first day (this is zero days since closed) and then incremented by one for each further day back in time that you go
DATE_CLOSED_WEEK	Date Closed Week	The week the issue was closed
DATE_CLOSED_YEAR	Date Closed Year	The year the issue was closed
DATE_CREATED	Day Created	The date and time the issue was created.
DATE_CREATED _MONTH	Month Created	The month the issue was created (useful when summarizing information)
DATE_CREATED _SINCE	Days Since Created	The number of days since the issue was created. Days are calculated using your own time zone, back to midnight for the first day (this is zero days since created) and then incremented by one for each further day back in time that you go

DATE_CREATED_TRUNC	Created	The date the issue was created
DATE_CREATED _WEEK	Week Created	The week the issue was created
DATE_CREATED _YEAR	Year Created	The year the issue was created
DATE_LAST_STATUS_CHANGE	Date of Last Status Change	The date and time of the last status change
DATE_LAST_STATUS_ CHANGE_SINCE	Days Since Last Status Change	The number of days since the last status change. Days are calculated using your own time zone, back to midnight for the first day (this is zero days since the last status change) and then incremented by one for each further day back in time that you go
DAYS_IN_STATUS	Days in Status	The number of days the issue has remained in its current status
DAYS_OPEN	Days Open	The number of days since the issue was created until it was placed in a <i>Closed</i> status.
EV_TOP_RANK	Top-n rank filter	This field only applies to summary reports. When it is applied, you enter a positive number. For example, if you enter 10, then the results displayed will only contain the ten results with the highest values. This is useful if you want to provide a summary count of issues where there are many rows returned, but only those with the highest <i>n</i> count may have useful data. Note that this feature is not supported on all databases. If your installation is utilizing MySQL as its underlying database, then this feature is inoperable.
MONTHS_IN_STATUS	Months in Status	The number of months (defined as 30-day periods) that the issue has been in its present status
MONTHS_OPEN	Months Open	The number of days since the issue was created until it was placed in a <i>Closed</i> status.
START_DATE	Created Start Date	Used as a filter to determine the created day from which to start counting issues
START_UPDATE	Updated Start Date	Used as a filter to determine the last day modified from which to start counting issues
STOP_DATE	Created Stop Date	Used as a filter to determine the created day to which you want to count issues

STOP_UPDATE	Updated Stop Date	Used as a filter to determine the last day modified to which you want to count issues
TIMESTAMP	Last Modified	The day and time an issue was last modified
TIMESTAMP_DAY	Day Last Modified	The day an issue was last modified
TIMESTAMP_MONTH	Month Last Modified	The month an issue was last modified
TIMESTAMP_SINCE	Days Since Last Modified	The number of days since an issue was last modified. Days are calculated using your own time zone, back to midnight for the first day (this is zero days since last modified) and then incremented by one for each further day back in time that you go
TIMESTAMP_TRUNC	Last Modified	The day an issue was last modified
TIMESTAMP_WEEK	Week Last Modified	The week an issue was last updated
TIMESTAMP_YEAR	Year Last Modified	The year an issue was last updated
WEEKS_IN_STATUS	Weeks In Status	The number of weeks an issue has remained in its present status
WEEKS_OPEN	Weeks Open	The number of weeks since an issue was created until it was placed in a <i>Closed</i> status.

Date Fields as Filters

When you use a field with a display type of **date** as a query filter, ExtraView will assume that the date has a time of midnight of the day selected. Your filter is set at the beginning of the day, not at the end. This may have an effect on the results within your report. At the same time, you should remember that this time is midnight for your own time zone. If different users have created and updated issues in different time zones, it is entirely possible (indeed probable) that the list of issues created or updated within your day is different than the list of issues created or updated within a different user's time zone.

Also note that if the date format stored within your user settings includes a time component (e.g. if you set *Medium with Time*), then you may see the time component of the date as you create a report or chart, if you use the pop-up calendar. However, the time will not be used when the report is run, or when you save the report.

Simple Arithmetic with Date Field Filters

It is often very useful to prepare reports for periods such as the last week, the last thirty days, or similar. To facilitate this, both **date** and **day** display type fields being used as report filters can utilize simple arithmetic. For example, you might want to prepare a report on all the issues created in the last week. To facilitate this, you would set up an advanced filter like so:

DATE_CREATED between \$\$SYSDAY\$\$ - 7 and \$\$SYSDAY\$\$

This works equally well using \$\$SYSDATE\$\$.

Only simple addition and subtraction work with this capability.

Point in Time Reports

There is a special filter which allows you to produce a report at any point in history. This has the title **Historic data filter** (its name is HIST_RANGE_END). If you choose this as a filter, then the report will be produced as of the data in the ExtraView system as of that point in time. This gives you a powerful mechanism to look back in history at any date.

If you are using this filter in the advanced search mode, note that the operator must be **equals** and that only the date in the first date entry field is used.

If the filter is not present, it means your administrator has not given you permission to use this feature.

Cloning Issues from a Report

This procedure only clones issues from one Project in your installation to another Project. The destination project may be within a different Business Area. The operation of this feature is from within the Mass Update facility described in the last section.

Follow the guide in the previous section and select the Project field from the list of available fields to update. Your administrator must have given you permission to write to this field within your current Business Area and Project. When you choose the Project field, you will see a screen similar to the following:

roject (PROJ	ECT) is d	ependent upon Bus	iness Area					
Business A lew value 1	rea and for Busii	the Projectfields.		e mass update function clones the issues into the values you select fo onfirm the clone operation.	B	ugs est Cases	¥	~
	-		nt to update to the n	ew value				
	ID #	Current value	Parent value				; Area	
View 🔽	10445	Test Cases	Test Cases	Check the database connection works correctly		Test Case	s	Test Cases
View 🔽	10424	Test Cases	Test Cases	We need to check that the sign on screen works correctly to the following spe	ecification	Test Case	s	Test Cases
View 🔽	10418	Test Cases	Test Cases	Check the version number of the install file		Test Case	s	Test Cases
View 🔽	10394	Test Cases	Test Cases	Check the voltage on pin 5 does not exceed 2.4V		Test Case	s	Test Cases
View 🔽	10377	Test Cases	Test Cases	Check how many commands are in the stack		Test Case	s	Test Cases
View 🔽	10376	Test Cases	Test Cases	Check user can log into CLI via telnet		Test Case	s	Test Cases
V	Click her	re to check or unche	eck all the issues in t	he list				
Genera	te Email							

Mass cloning of issues from one Project to another

- You must give your consent to the cloning of the issues displayed before proceeding.
- Select the destination Business Area and Project in which to place the newly created issues
- Proceed by clicking on the Clone all records button

Sorting Report Result Columns

You can resort the output from a Quicklist or other report by pressing the title at the head of the column.

ExtraVie	w Quickl	ist Report		1	Refresh	Update Issues	Return	Print Page
							Records	1 to 5 of :
		/						
		ess area = Bugs AND A	ssigned To = Bill	Smith				
Prepared by	Bill Smith on	arch 9, 2006						
	▼ID #	Business Area	Title				Days O	pen
	Priority	Customer	Status	= Product		Module	Assign	ed To
View Edit	10454	Bugs	After rebooting	the processor, the scre	een will sh	ow a wrong module	7	
	P1		Open	Tracker Enterprise		GUI	Bill Smith	
View Edit	10373	Bugs	Notifications are	e not sent upon submis:	sion.		156	
	P 2	GE	Open	Tracker Enterprise		GUI	Bill Smith	
View Edit	10318	Bugs	This is a test				318	
	P 2	NEC	Open	Tracker		Database	Bill Smith	
View Edit	10231	Bugs	The link from th	e report page "Support"	button is l	broken	405	
	P 3		Open	Tracker		GUI	Bill Smith	
View Edit	10226	Bugs	Provision of TN	CP problem			406	
	P1		Open	Tracker			Bill Smith	

Resorting Report Columns

The current sort is shown with an arrow. When you first click on the title, it will resort by that column, in ascending order. If you press the same column label again, the column will be sorted in descending order.

Each time you press a label to resort the report output, the previous sort order is remembered, and becomes a secondary sort within the report.

Not all fields can be sorted, and the ExtraView administrator has the ability to make decisions about which fields can be used for sorting. If you cannot sort a column, there will be no icon besides the column heading, and the heading appears in a different color.

Sorting multi-valued list fields can have results that at first glance do not give the results you expect. First, when you click on a field to sort the results, and then click on a second field to sort by that new field, the original sort order is retained as a secondary sort to the second sort. Now, with multi-valued fields, you will get duplicated rows with sorted values appearing at all the positions where they belong, according to the sort. This is true whether the sort field is the primary sort field or not. A further complication is that when duplicated rows appear adjacently in the report, the second is elided, i.e. you will never see the same row twice together in the report. This can change the number of rows rendered, depending on the sort.

Security Permissions and Reporting

You are only able to view columns and fields on reports that your administrator has given you permission to view. If you are granted permission to view a report that contains individual fields that you do not have permission to view, the restricted fields are dropped from the report.

The behavior is such that not only will you not see fields that you do not have permission to view, but these

same fields will be dropped from the report preparation, if they have been used as report filters or summary columns on a Summary report. If you have permission to view a report, but you do not have permission to view any of the fields on the report, ExtraView will offer you a message that tells you that you do not have permission to view the report.

Reports with Repeating Rows

It can sometimes be important to understand the distinction that ExtraView makes between rows on a report and records on a report. This difference in semantics is used to distinguish between the times when ExtraView returns a precise number of records on a report and when it returns a set of *rows* that may or may not correspond exactly to the number of records. The difference comes when a query may return a single record multiple times on a report, or count the same record multiple times on the same report. This happens when there are one-to-many relationships within your data and with repeating rows on reports. The two most common times this happens are:

Reporting with Repeating Record Fields

- You prepare a report that uses repeating row records, then use a repeating row field to sort the report. When you use a field on a repeating row record to sort, it will generate a row on the report for each occurrence of the repeating row. Therefore, if you have 3 repeating rows within a single issue, it will generate 3 *rows* on the report for each *record*.
- You use reporting hierarchies. In a similar manner to the above bullet, one record at a level in the hierarchy may have multiple child records, and when you sort by a field at the child level, you will generate one *row* on the report for each *record*.
- If you create a report and want to place any fields from the Release field on the report, you must always include the RELEASE_FOUND field on the report, as this is the key field used to extract the remaining fields from the ExtraView database.

Reports that Include Repeating Row Fields from Different Repeating Row Layout Types

When you have reports that include fields from two or more repeating row types, it can be confusing to view the results from the different layout types aligned on the same row of the report, as the data from any one repeating row record is unlikely to be related to the data from any other repeating row record. Care should be taken when interpreting the data displayed on a report which contains data from multiple repeating row layouts.

Managing your Personal Options

Note that you must have been granted permission by the system administrator to see and update your personal options. If you are using the standard interface, you click on your name in the navigation bar in order to access your personal options:

\leq		Account: Bill Smith	Administrator 💌		
\leq		- E	Bugs 💌		
lelp	Sign Off	* Select a report *	•		
		Ext	raView Home		
ation	Need N	lore?			
	Solutions & configurations Online product tours Contact ExtraView Corporation Support & upgrade pricing				
atuses	New 200	Open Issue 200 150	es by Priority		

If you are using the workspace interface, you access your personal options from the Home Menu:



You will be asked for your password before gaining access to your personal options.

Personal Information

- User ID You may not change your User ID. Once this was created it is a permanent entry into the database
- Alternative User ID You may change your Alternative User ID and use this to sign on to ExtraView, as opposed to using your User ID. Given you are not able to alter your User ID, this provides a convenient mechanism to change your sign on. For example, this can be used to alter your sign on ID when you change your name upon marriage. This field is only visible if your administrator has enabled it
- Password
- First name and last name

- Password
- Email address
- Job Title
- Company name and **address**
- Telephone contact numbers
- Security Information (only displayed with permission)
- Photograph and signature (only displayed with permission)

Update User Cancel Print Page	Change user's details: DEV (Enabled) 👔
PERSONAL INFORMATION PERSONAL OPTIONS	REPORT OPTIONS NOTIFICATION OPTIONS
User Information	Security Information
User ID ? DEV	Enabled User ?
First name ? Jimmy	
Last name ? Duncan	Expiry Interval ? 0
Password ?	Expire password now ?
Verify password ?	
Email address ? jimmy@xxx.com	
	Default Business Area & Project
Company name ? Superior Software Corp	Photograph ?
Address ? 269 Mount Hermon Road	(@)
	Upload
City ? Scotts Valley	Delete
State / Province ? CA	
Zip / Postal code ? 95066	Signature ?
Country ? USA	5
Work phone ? (831) 461-7100	Upload M. Cinnetare
Home phone ? (831) 461-7100	Delete My Signature
Cell phone ? (831) 461-7100	
Fax ? (831) 461-7100	
Pager ? (831) 461-7100	
Update User Cancel Print Page	

Personal Details input

Personal Options

- The **text size** within your browser. You can select *small, medium* or *large* fonts for the display. Most users prefer the *small* option
- Language. If this prompt is visible, you can alter your language setting to the available languages in the list. When you select a language, this also has the effect of allowing you to select different date formats. For example, if you choose *English (United States)* as opposed to *English (Great Britain)*, the date formats presented to you will be according to the convention of the country. Also, if the language of the country is not English, all dates will be presented in your local language
- Time zone to which you belong
- **Date format** to use on display of date fields and an optional date mask to further customize the display of the date. See Appendix A for details of how to set the date mask, if one of the inbuilt date formats is insufficient for your needs

- Selection of 12 or 24 hour format in which to display the time
- File Attachment char set. You can set a default character set for documents you upload. The default for the English language is UTF-8, but you can use other values. For example, in Japan, Shift-JIS is the most likely value for this field. This option will not appear if your administrator has not enable working with some languages
- Chart font. This font will be used on charts you prepare.
- Start Page. If this option has been made available to you, you can set your start page to be one of the following: Home Page, Search / Report screen, Add Issue, Administration or Workspace. If you select an option to which you do not have permission, you will be directed to the Home Page.
- Workspace Settings. If you have been granted permission to utilize workspaces, then you may set some options for this.
 - **Default Workspace** you can set the default workspace to be loaded when you first enter the workspace feature
 - Size of icons on panels -Choose small or large icons in the panel menubars
 - **Drilldown for Reports** you can select whether your personal preference is to minimize the number of Quicklist panels opened when you drill down from reports. You may prefer to keep this number to a minimum, or to create a new panel with each new drilldown
 - Auto-scroll to Panels you may choose what action that ExtraView takes when you click on a panel within a workspace. The default is that the panel obtains the focus and you work within that. However, you can choose to have ExtraView auto-scroll as much of the panel as it can, into view, from the top left-hand corner of the workspace that's visible. The first choice is better if you do a lot of dragging and dropping of issues between panels, as the panels will remain in their place within your browser. The second choice is better if you work mainly in *add* or *edit* screens, and want to see as much of their contents as possible, when you click on a panel. In both cases, clicking on a panel's icon within the navigation bar, will auto-scroll the viewing area of the workspace to make as much of the panel visible as is possible
 - Scroll Panels setting this to Panels Do Not Need Focus allows you to scroll the workspace canvas or any workspace panel or element within that panel when the mouse pointer is over the respective area. Panels do not get focus when this happens. The Panels Need Focus option signifies that you can only use your mouse to scroll the panel and its elements, if the panel has focus. You need to sign off and on again for this to take effect
 - Vertical Offset for New Panels If this is set to Yes then new panels are opened to the right and down from the position where the previous panel was opened. If you set this to No then new panels are only opened to the right of the previous panel, and at the same vertical offset.

Update User Cancel Print Page			Change user's details: B	SMITH (Enabled) 김
			10	
PERSONAL INFORMATION	PERSONAL OPTIONS	REPORT OPTIONS	NOTIFICATION OPTIONS	PRIVACY GROUPS
Text size	? Medium 🔻			
Language	? English(United States)	•		
Time zone	(GMT -8:00) America/L	os_Angeles	•	
Date format	? Long w/time: Decembe	r 9, 2016 3:50:52 PM PST	•	
Custom date mask	?			
Time in 24 hour format	? 🔍 Yes 🔹 No			
Browser character set	2 UTF-8 Unicode 8-bit Tr	ansfer 🔹		
MS Office char. set	UTF-16LE Unicode 16-	bit LittleEndian 🔻		
File attachment char. set	2 UTF-8 Unicode 8-bit Tr	ansfer 🔻		
Email character set	2 UTF-8 Unicode 8-bit Tr	ansfer 🔻		
Chart / PDF output font	? Arial	•		
Start page	Report Screen 🔹			
Workspace Settings				
Default Workspace	Test Case Managemen	t Workspace (Administrato	r) v	
Size of icons on panels	? O Small Large			
Drilldown from Reports	? O Reuse the same wor	kspace panel	new workspace panels	
Auto-scroll to Panels	? 🖲 Yes 🔘 No			
Scroll Panels	? O Panels Need Focus	Panels Do Not Need	Focus	
Vertical Offset for New Panels	? O Yes 🖲 No			
Update User Cancel Print Page				

Personal Options input

Report Options

This screen controls the options to access reports for each user.

- **Drilldown Format** (Quicklist or Detailed Report). This offers you an alternative when you drill down from a summary report, to reach the Quicklist or the Detailed Report. See the reporting section of this guide for information on the Quicklist and the Detailed Report
- Choice of up to three reports that are available to you to place on your Home Page. Each report must have been previously saved, and you must have permission to run the report. You may also select these reports directly from the Home Page.

Update User Cancel Print Page	Change user's details: BSMITH (Enabled)
Basic Information Personal Options Report Options Notification Options	Privacy Groups
Report Options tab	
Drilldown report format 🕐 Quick List 💌	
Home Page report #1 Home Page Dashboard	
Home Page report #2 My Open Issues	
Home Page report #3 Assigned To by Status	
Update User Cancel Print Page	

Report Options Input

Notification Options

This section controls the notification of issues to you.

- Notification Options. You can turn on and off email notification at your primary email address (entered on the Personal Details tab) and at your alternative email address that you define on this tab. Control of sending notification to each of the addresses is independent.
- Alternative Email Address You can enter an alterative email addres and elect to receive emails at this address
- Notify on Own Updates. If you select no for this option, then email notification to yourself will not take place for changes that you initiate
- **Receive Attachments with notifications**. Use this option to suppress incoming attachments with your notifications
- Email format for notification HTML, plain text (full), plain text (brief), or plain text (very brief). The HTML and plain text (full) options will send a notification of all the key fields; the plain text(brief) option displays a smaller set of the fields that changed and the plain text (very brief) displays only the changed fields
- Interest Lists. This displays all the interest lists to which you may subscribe. Note that many of these allow you to opt-in or opt-out of the interest list, according to how your administrator defined the interest list. Interest lists are used to notify users when specific values are present in issues, such as notifying an account manager when an issue for one of their customers is updated
- Escalation Rules You can opt-in and opt-out of all escalation rules that your administrator has made eligible for you to join and leave. Escalation rules are used to provide automatic notification to you or other users when specific criteria defined in the escalation rule have been exceeded. For example, issues that have not changed in Open status for more than one week may be escalated.

Update User Cancel Print Page	Change user's details: BSMITH (Enabled)
Personal Details Personal Options Reports Notification Options	User Roles/Security Privacy Groups
	s a New high priority customer issues Base ase Data Newly published knowledge base issues g to s stomer = Bank of America oduct = Tracker ay join sues calate Customer P 2 Issues 1 day after creation, if they still open
Update User Cancel Print Page	

Notification Options input

Editing your personal account options

- On the navigation bar, click on your name
- After entering your password you will be able to change your account options
- Enter or update your data on any of the tabs on the screen
- To save your information, click the Update User button.

External User Directories

An LDAP Server or Active Directory may be used to authenticate users in a centralized fashion for your installation. If your company has enabled this functionality of ExtraView, then searching for users works slightly differently to accommodate the fact that you may be searching through many thousands of entries for the name you seek. If your administrator has set up a central directory, there will always be a "user list" icon by the name field. You can either enter a name in the field and continue, or enter no name in the field, or enter a partial name. When you enter no name or a partial name and click on the "user list" icon, a search form appears, similar to the following screen:

🕙 http://nerdvana.extraview.net - ExtraVie	iew - Microsoft Internet Explorer 📃 🗖 🔀					
Lookup User Account Directory	Search for Account Clear Form Cancel Print Page					
Use this form to search the directory for users. Enter information you know about the user. The more information you enter, the more likely you are to find the user you are looking for. In the fields, you can enter as much of the name as you know. For example, 'Smi' entered in the last name field will match 'Smith', 'Smile', etc. You can use an '*' as a wildcard pattern in your search. Searching is not case sensitive						
contraint e.						
Directory Search						
Last Name						
First Name						
User ID						
Sort By 🛛 Last Name 💌]					
Search Results						
There are no results to display at this tir 'Search for Account' button.	ime. Please enter your search criteria and press the					
	Search for Account Clear Form Cancel Print Page					
	×					
E Done	🧭 Internet 🛒					

LDAP and Active Directory search form

Use this form to search for the name you want to select. You simply click on the **User ID** of the name you want to select, when the search returns one or more results.

Ambiguous Entries When Searching for Users

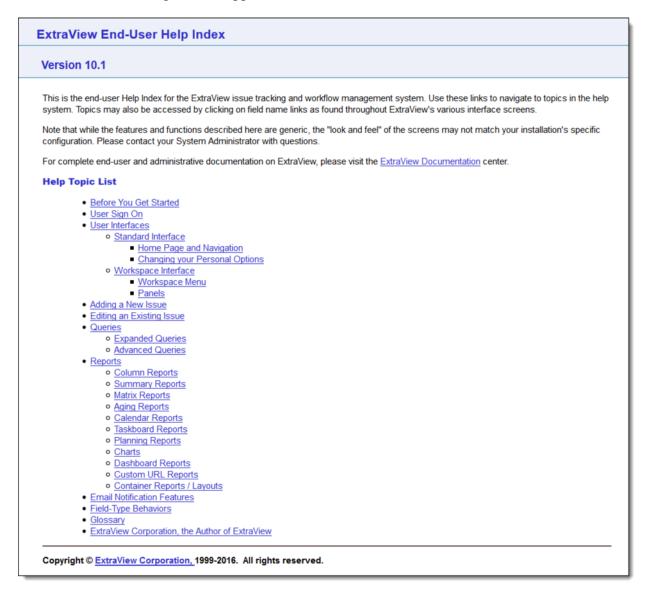
Occasionally, you may need to look up a list for a value, but find that several entries match the search. For example, there may be more than one John Smith in an organization. Ambiguous names may also occur if you only enter a partial name in a field, and then try to insert or update the record. The following screenshot shows how ExtraView presents the information to you, if you entered the letter "G" in a field, then attempted to update the record:



Resolving a user with an ambiguous name

ExtraView Help

The ExtraView application includes a comprehensive HTML-based help system that you can access at any time by clicking the **Help** button on the navigation menu. In addition, many tool tips and context-sensitive links are defined throughout the application.



Index screen

Appendices

Date Masks

Overview

Each ExtraView user has the capability to set their date and time format. The date and time formats determine how dates and times are displayed in output text or html and how they are parsed when entered by the user. The user can select their date and time format on the Personal Options screen. Either one of the in-built formats can be selected, or the user can set the **Date Format** to the value of **Custom Date Mask** and then provide their own mask in the field labeled **Date Mask**.

Localizable Date and Time Formats

Dates and times are represented differently around the world. An ExtraView user may choose one of the date/time formats that are sensitive to the specific locale they are using. The following date and time formats will be represented differently dependent on the user's current locale setting. The following table shows the date format names used in ExtraView, with an example of how this appears in English/US locale representation:

Format Name	Description	Example
SHORT	Short without time	12/30/02
MEDIUMDATE	Medium without time	Dec 30, 2002
LONGDATE	Long without time	December 30, 2002
FULLDATE	Full without time	Monday December 30, 2002
SHORTDATETIME	Short with time	12/30/02 1:15 PM
MEDIUMDATETIME	Medium with time	Dec 30, 2002 1:15 PM
LONGDATETIME	Long with time	December 30, 2002 1:15 PM
FULLDATETIME	Full with time	Monday December 30, 2002 1:15 PM

Standard Date/Time Parsing Formats

Certain date and time formats are built in to ExtraView as patterns to be used for parsing dates. If a date is entered in one of the standard formats, it will be parsed without any errors. Use of a custom date mask extends the possible date/time entry formats to include the custom mask pattern.

The following are the standardized date/time parsing formats:

Format	Example
MM/dd/yy	04/21/03
dd/MM/yy	21/04/03
MM/dd/yyyy	04/21/2003
dd/MM/yyyy	21/04/2003
dd-MMM-yy	21-April-03
dd-MMM-yyyy	21-April-2003
yyyy/MM/dd HH:mm:ss z	2003/04/21 10:23:34 PST
yyyy/MM/dd HH:mm:ss	2003/04/21 10:23:34
yyyy/MM/dd	2003/04/21
yyyy-MM-dd HH:mm:ss	2003-04-21 10:23:34
yyyy MM dd HH:mm:ss	2003 04 21 10:23:34
MM-dd-yyyy HH:mm	04-21-2003 10:23
yyyy-MM-dd	2003-04-21
MM/dd/yy HH:mm	04/21/03 10:23
MM/dd/yy HH	04/21/03 10
yy-MM-dd	03-04-21
MMM dd yyyy	April 21 2003
MMM dd, yyyy	April 21, 2003
MMM. dd yyyy	Apr. 21 2003
MMM. dd, yyyy	Apr. 21, 2003

Custom Date Masks

A custom date mask provides the ExtraView user with the maximum of flexibility, but the representation of dates and times using a custom date mask are formatted similarly regardless of the user's current locale setting. Text strings such as month names or days of week within the representation are locale-sensitive.

Entry of date values into forms can use one of the ExtraView standard date formats or whatever format the user has defined using a custom date mask.

Custom date masks consist of a sequence of characters consisting of punctuation or pattern letters that are chosen from the following:

Letter Date or Time Component Usage Examples

G	Era designator	G	AD
У	Year	уууу, уу	1996; 96
Y	Week Year (context sensitive)	ΥΥΥΥ, ΥΥ	2015; 15
М	Month in year (standalone	MMMM, MMM, MM	July; Jul; 07
L	Month in year	LLLL, LLL, LL	July; Jul; 07
W	Week in year	WW	29
W	Week in month	W	3
D	Day in year	DDD	219
d	Day in month	dd	10
F	Day of week in month	F	3
Е	Day in week	EEEE, EE	Tuesday; Tue
a	Am/pm marker	a	PM
Н	Hour in day (0 - 23)	HH	24
k	Hour in day (1-24)	kk	24
K	Hour in am/pm (0 - 11)	КК	10
h	Hour in am/pm (1-12)	hh	12
m	Minute in hour	mm	30
S	Second in minute	SS	55
S	Millisecond	SSS	834
Z	Time zone (general)	Z	Pacific Standard Time; PST; GMT-08:00
Z	Time zone (RFC 822)	Ζ	-0800
Х	Time zone (ISO 8601)	Х	-08:00

Pattern letters are usually repeated, as their number determines the exact presentation:

- **Text**: For formatting, if the number of pattern letters is 4 or more, the full form is used; otherwise a short or abbreviated form is used if available. For parsing, both forms are accepted, independent of the number of pattern letters.
- Number: For formatting, the number of pattern letters is the minimum number of digits, and shorter numbers are zero-padded to this amount. For parsing, the number of pattern letters is ignored unless it's needed to separate two adjacent fields.
- Year: For formatting, if the number of pattern letters is 2, the year is truncated to 2 digits; otherwise it is interpreted as a number. For parsing, if the number of pattern letters is more than 2, the year is interpreted literally, regardless of the number of digits. So using the pattern "MM/dd/yyyy", "01/11/12" parses to "Jan 11, 12 A.D". For parsing with the abbreviated year pattern ("y" or "yy"),

ExtraView must interpret the abbreviated year relative to some century. In ExtraView, the year on a date parsed from user input is always checked to see if it is greater than 1000. If not, the year is adjusted to a more "rational" value by adding either 1900 or 2000 to the specified year. 2000 is added if the result would be less than or equal to the current year, otherwise, 1900 is added. For example, using a pattern of "MM/dd/yy" and a date presented on Jan 1, 1997, the string "01/11/03" would be interpreted as Jan 11, 2003 while the string "05/04/64" would be interpreted as May 4, 1964.

- Month: If the number of pattern letters is 3 or more, the month is interpreted as text; otherwise, it is interpreted as a number.
- General time zone: Time zones are interpreted as text if they have names. For time zones representing a GMT offset value, the following syntax is used: GMTOffsetTimeZone: GMT Sign Hours : Minutes Sign: one of Hours: Digit Digit Digit Minutes: Digit Digit Digit: one of 0 1 2 3 4 5 6 7 8 9 Hours must be between 0 and 23, and Minutes must be between 0 and 59. The format is locale independent and digits must be taken from the Basic Latin block of the Unicode standard. For parsing, RFC 822 time zones are also accepted.
- **RFC 822 time zone**: For formatting, the RFC 822 4-digit time zone format is used: RFC822TimeZone: Sign TwoDigitHours Minutes TwoDigitHours: Digit Digit TwoDigitHours must be between 00 and 23. Other definitions are as for general time zones. For parsing, general time zones are also accepted.

The HTML Area Utility

The HTML Area is available to as a rich text editor for HTML, allowing you to enter rich text or HTML without knowing the HTML language. It offers many features similar to a word processor, but it is not a full word processor, due to the limitations of Internet browsers. Advanced users may switch to edit HTML directly. HTML Area fields may contain images which are pasted into the field from the user's clipboard. Likewise, entire files may be embedded. Embedded files are represented by an icon, once they have been placed within the field.

As you enter text / images into an HTML Area field, it will grow in height to allow you to see as much of the information as possible, to a maximum height which is set to be a little less than most screens.

As set by your administrator, one of three available toolbars will be displayed, or you may customize a toolbar solely for your company's use. The built-in toolbars are shown in the following screenshots. Your administrator may have cofigured the toolbar with a different set of buttons for your site. The HTML Area utility makes use of scripts that run within the browser, and according to the security settings of the browser, you may need to acknowledge that it is OK to run these scripts. If you are using a mobile client, only the basic toolbar is initialized, to conserve space on the screen.

Images and Embedded Files

There are several methods of including images and files within your HTML Area fields:

• Paste an image into the field from your computer clipboard. Simply place the cursor at the point where you want the image to be included, right-click with your mouse and choose the paste option. Ctrl-V accomplishes the same action. Depending on your browser settings you may see a popup window and be asked to paste the image again. You will see a message that the image has been

uploaded and the image will appear within the field

- You can include an image that resides on any server by knowing the URL path to the image. In this case, use the 🖾 button on the toolbar and enter the URL of the image. You will see the image at the point where you inserted it in the field
- You can copy a document type file, such as a word processing or spreadsheet file from the computer clipboard into the field. When pasted, you will see an icon as a placeholder within the field. When viewing the issue, you can click on the icon to download and view the file.

Basic Toolbar

B I U T_x ;::: @ @ |

Standard Toolbar

Source 🖨	6	(† (m) (~ ~)	Styles +	Format 👻	Font -	Size +	<u>A</u> - D -	53
BIUS×	x ^e <u>I</u> x		99 號 ≘		•	• • •	- 🙂 Ω	\odot

Full Toolbar

O Source Q ■ E ★ ℃ Ê Ê Ê ↓ ★ /	Q b _a ∰ B I <u>U</u> S x _a x ^a <u>I</u> x
]≣ :≡ ∰ ∰ 99 0% E E E E →¶ ¶∢	
Styles - Format - Font - Size -	<u>A- M-</u> 📾 🖘 🍽 🔀 🗐

The use of the HTML Area field is intuitive. Just enter text and use the buttons on the toolbar to provide the formatting.

Note that there are some limitations when entering and updating text within the utility. A key limitation is that you cannot click on a link when the field is being updated. This functionality only works when the field is in read-only mode.

The available toolbar buttons are:

Basic	Standard	Full	Button	Function
\checkmark	\checkmark	\checkmark	В	Toggle bold on and off for the selected text
\checkmark	\checkmark	\checkmark	I	Toggle italic text on and off for the selected text
\checkmark	\checkmark	\checkmark	U	Toggle underlined text on and off for the selected text
\checkmark	\checkmark	\checkmark	<u>I</u> _x	Remove text formatting from the selected text
\checkmark	\checkmark	\checkmark	1= 2=	Toggle a numbered list for the selected text
\checkmark	\checkmark	\checkmark	• = • =	Togle a bulleted list for the selected text
\checkmark	\checkmark	\checkmark	ශ	Add a link to the selected text

Basic	Standard	Full	Button	Function
\checkmark	\checkmark	\checkmark	ę	Remove the link from the selected text
\checkmark	\checkmark	\checkmark	B	Print the contents of the HTML Area
	\checkmark	\checkmark	Source	Toggle the display mode between "what-you-see-is- what-you-get" and HTML source views
	\checkmark	\checkmark	X	Cut the selected text to the clipboard
	\checkmark	\checkmark	G	Copy the selected text to the clipboard
	\checkmark	\checkmark		Paste the text from the clipboard to the cursor position
	\checkmark	\checkmark	(*)	Paste the text, as plain unformatted text, from the clipboard to the cursor position
	\checkmark	\checkmark		Paste text from Microsoft Office documents - this will remove the obscure formatting that Microsoft Office documents often contain
	\checkmark	\checkmark	*	Undo the last operation
	\checkmark	\checkmark	*	Redo the last operation that was undone
	~	~	Styles •	Use a style from the list. Note that there are interdependencies with the Style, Format, Font and Size lists. Not all combinations work with all computers, as your browser, or computer operating system may not support the combination you choose
	~	~	Format +	Format the text from the selections within the list. Note that there are interdependencies with the Style, Format, Font and Size lists. Not all combinations work with all computers, as your browser, or computer operating system may not support the combination you choose
	√	~	Font	Select a font from the selections within the list. Note that there are interdependencies with the Style, Format, Font and Size lists. Not all combinations work with all computers, as your browser, or computer operating system may not support the combination you choose
	\checkmark	\checkmark	5	Set a size for the text from the selections within the list. Note that there are interdependencies with the Style, Format, Font and Size lists. Not all combinations work with all computers, as your browser, or computer operating system may not support the combination you choose

Basic	Standard	Full	Button	Function
	\checkmark	\checkmark	A	Set a color for the selected text
	\checkmark	\checkmark	А	Set a background color for the selected text
	\checkmark	\checkmark	×	Mximize / Restore the size of the HTML Area within the browser
	\checkmark	\checkmark	\$	Strikeout the selected text
	\checkmark	\checkmark	×₂	Subscript the selected text
	\checkmark	\checkmark	ײ	Superscript the selected text
	\checkmark	\checkmark	<u>==</u>	Outdent the selected text
	\checkmark	\checkmark		Indent the selected text
	\checkmark	\checkmark	99	Place the selected text in blockquotes
	\checkmark	\checkmark	DIV	Place the selected text in an HTML DIV
	\checkmark	\checkmark	ł	Left-justify the selected text
	\checkmark	\checkmark	Ē	Center-justify the selected text
	\checkmark	\checkmark	III	Right-justify the selected text
	\checkmark	\checkmark		Full-justify the selected text
	\checkmark	\checkmark		Insert an HTML text anchor tag
	\checkmark	\checkmark	**	Insert an image
	\checkmark	\checkmark	===	Insert a table
	\checkmark	\checkmark		Insert a horizontal rule
	\checkmark	\checkmark		Insert a smiley face
	\checkmark	\checkmark	Ω	Insert a character symbol
	\checkmark	\checkmark	٩	Insert an HTML Iframe
		\checkmark	Q	Search for text within the HTML Area field
		\checkmark	€¢d	Search and replace text within the HTML Area field
		\checkmark		Select all the text within the HTML Area field
		\checkmark	۱	Text direction goes from left-to-right (the default)
		\checkmark	¶ (Text direction goes from right-to-left

Basic	Standard	Full	Button	Function
		\checkmark	Ň	Insert a page-break for printing