# **End User Guide**

The ExtraView User Guide provides information on all the end-user topics of the ExtraView webbased 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</u> <u>Acrobat 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 <u>ExtraView Administration Guide</u>. 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.

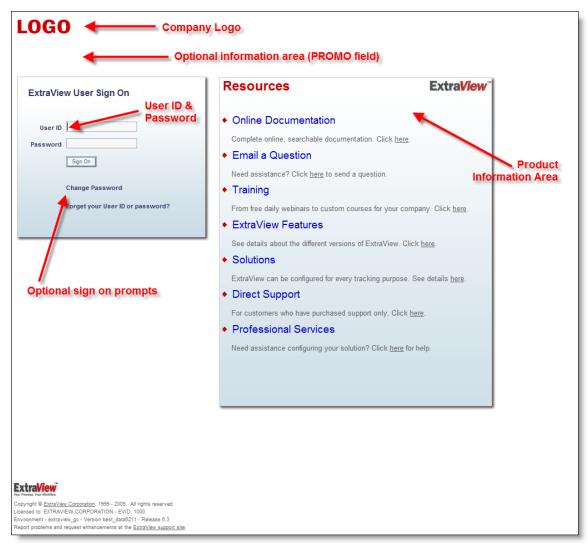
# **ExtraView Functional Highlights**

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:

Use this Screen to Reset your Password When you confirm your User ID or your email address, an email will be sent to your primary email address, with a link that allows you to reset your password. This link will remain active for a period of 24 hours only, so please take immediate action to restore your access. User ID ? or Email Address ?	Proceed	Cancel	Print Page	Forgotten Password
	Wł add 24	nen you co dress, with hours only User	nfirm your I a link that y, so please ID ?	ser 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
Proceed Cancel Print Page				

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 self-register as a user, an email is sent immediately to the administrators of ExtraView, to confirm your registration.

0G0		
ExtraView User Sign On	Resources	ExtraView <sup>**</sup>
User ID	<ul> <li>Online Documentation</li> <li>Complete online, searchable documentation.</li> <li>Email a Question</li> </ul>	Click <u>here</u> .
Sign On Change Password New User Registration Forget your User ID or password?	Need assistance? Click <u>here</u> to send a quest Training From free daily webinars to custom courses to	
	<ul> <li>ExtraView Features</li> <li>See details about the different versions of Ext</li> <li>Solutions</li> </ul>	
	ExtraView can be configured for every trackin  Direct Support	
	For customers who have purchased support of Professional Services Need assistance configuring your solution? C	

ExtraView Sign On screen

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

Submit C	Cancel	Print Pag	e		Add new user
Basic Info	ormatio	n Por	sonal Ontions	Notification	Ontions
Dasie init	onnauo	101	Sonal Options	Nouncation	options
Use		mation			
		er ID 김			
Altern		er ID 🤶			
	Fin	st name			
		st name			
		vord 김			
	/erify pa	L			
Primar	ry email a				
		Job title			
	A	ddress			
		City			
	State / P	L			
Z	Zip / Pos	L			
		Country			
		k phone			
		e phone			
	Ce	Il phone			
		Fax			
		Pager			
	Use	r field 1			
Submit C	Cancel	Print Pag	e		

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

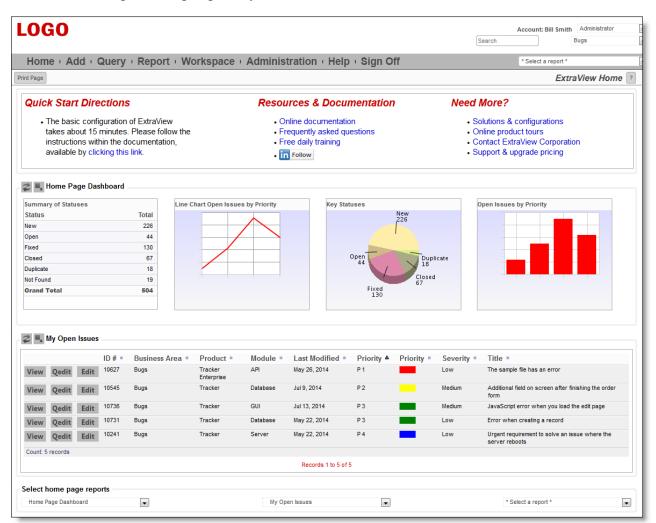
The most common reason that ExtraView will sign you off automatically is that your administrator has set an expiry period on the length of time for which you may remain idle and still remain signed on. If you are idle (you do not submit a request or a form to the server from your browser) for more than 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, screenby-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 wth 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.

LOG	<b>0</b> -L	ogo		Search for D #	Drillo Box	lown		/ Projects	
Home	Add	Query	Report	Workspace	Admin	Help	Sign Off	* Select a report *	Roles 🗖
			lenubar		Navigati	on	Ren	orts ExtraVie	w Add Issue
	Manage Land	a she a s	~~^~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		Buttons	Served a served a		and a subscription of the second s	A and the strend

### **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 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

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.

	GC	<b>`</b>				Neurie	untion Bor				Bill Smi	
	-	-					ation Bar					Bugs
lome		Add	Query	4	dmin	Help	Sign Off	Search for ID #	Go	_	Reports	
rint Page												ExtraView Hom
uick S	Star	t			Resou	rces & Do	cumentation		1	Need More	e?	
		ur users					de to Administration	Sign O	n		ticated configuration	ıs
		te your lis dding issu				equently aske ee daily trainii		Messa		Produc     Person	t Tour alized demonstratio	in
00		ading 1990				ocumentation			9-	<ul> <li>Pricing</li> </ul>		
earch	h the	e Extra	View Knov	vledg	je Base							
			Pro	oduct *	Any *	👻 Keyv				Se		wledgebase
							Se	arch Attachments?		Тор	Issues Lay	out
					0.1-							
hortc				_		ortcut Bu						
Add a F	Feature	Request	Add a New E	Bug	Add a New	Customer	Add a New Customer Issu	e View My Is	Sues Vie	ew My Team's Issu	Customer List	High Priority Issues
lome	Pag	e Dash	board									
					0	and her Parts		( 04-4-			0	
umman itatus	y of S	tatuses		Total	-	ies by Busines	s Area Total	Key Statuses			Open Issues by Pric	onity
ew				10tai 98				Ope 2		ew B	150	
pen				24	-	\$	Home Page Dashboard					
ixed				135			Deport			_	Not 100	
losed uplicate				63 17				Fixed		Duplicate	50	
ot Found				19		· · · · · · · · · · · · · · · · · · ·	1	135		losed	0 P1	P2 P3 P4
irand To	otal			356	Grand Tot	tal	24		6			Priority
		ID # = 10323	Area I	Proc	duct =	Module GUI	Last Modified = 8/11/08 9:51 PM	Priority ▲	Severity =	Title = new java file	channes	
		10323	Bugs	Track		601	8/11/08 9:51 PM		_ow		INCP problem	
	_	10557	Bugs	Track		Database	4/17/09 9:08 PM	P 3			fect in the admin module	when a user makes
view E	Edit	10552	Bugs	Track	ker	Database	8/14/08 9:51 PM	P3	_ow		I may be off center	
view E	Edit	10526	Helpdesk	Track	ker		8/11/08 1:03 PM	<sup>P3</sup> Home	2200		to provide a new telep	hone extension for
View E	Edit	10353	Customer	Track	ker	Processor	1/8/09 4:05 PM				e - Frank Bell / how exclusive or's an	e processed internally
			Issues									
View _ E	Edit	10293	Customer Issues	Track	ker		1/8/09 4:05 PM	P3	_ow	Customer rep	oorts a missing item in th	e most recent delivery
View	Edit	10285	Customer Issues	Track Enter			1/8/09 4:05 PM	P3	_ow	Customer cal sent on 4/3/0	led to say he did not rec 5	ceive the spare part
Count: 8 i	record	is					Records 1	to 8 of 8				
							10001301					
Bugs b	by P	riority	by Status							Deineite		
							P 1		P 2	Priority P 3	P 4	Total
		New					4		5	13		22
		Not Ye	t Tested		Lie me -	Dece				1		1
e						Page	4		2 21	2 23	1	9
s t		Open Fixed			Matri	V Denort			<b>4</b> 1	25	-	01
t a t		Open Fixed Closed	1 L		Matri	x Report	3		6	12	6	27
t a		Fixed			Matri	к керог			6 3	12 3	6 1	
t a t u		Fixed Closed Duplica Not Fo	ate		Matri	к керогт	3		3 2	3 4	1 1	27 7 8
t a t u		Fixed Closed Duplica	ate		Matri	к керогт	3		3	3	1	7
t a t s		Fixed Closed Duplica Not Fo Total	ate				3	ors	3 2	3 4	1 1	7

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 will 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.

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:

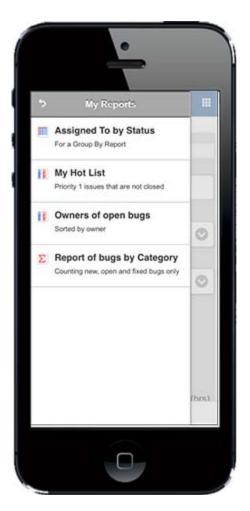
User II	Change user's details:		
TEST			
First n	ame		
Chris			
Last n	me		
King			
Passw	ord		
Verify ;	assword		
••••			
Email	ddress		
Testu	vert@hotmail.com		
Time z	one		
	(GMT -8:00) America/L	os_Angeles	0

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.

≡ ExtraViev	v Add Issue
Customer Issue	
DE	TAILS
The	
Source	Category
Email 📀	• None • 📀
Product	Module
•None • 💿	• None • 📀
Status	Originator
New 🔘	Bill Smith
Assigned To	Software Bug?
• None • 💿	N
	Estimated Time (hrs
C	0

ExtraView Add Task	1
Title	
Due Date	
	69
Status	
Open	0
Priority	
Medium	0
BIUT	

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.

### **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.

me Pag	e Dashb	ooard											¢∎–	
mary of S	tatuses					Issues by Priority		Key Statuses				Open Issues by Priority		
tus	200 150							New 200		200				
				$- \Lambda$						150				
n	126 E 100				Open 31		· ·		100 E					
ed 126 osed 67		126 <u>5</u>				31.				S 100				
ea icate				18	50		H			Dup 18	olicate	50		
Found				19	0							0		
nd Total			4	161	1	P 2	4	F	ixed 126	Close 67	d		3 P.4	
						Priority			126			Priority		
Му Оре	en Issue	s										4		
for Home	e Page												Recor	ds 1 to 6 of 6
			ID # =	Business A	Area =	Product =	Module =	Last Modifi	ed =	Priority 4	Severity =	Title =		
View	QEdit	Edit	10241	Bugs		Tracker		11/17/12 21:2	26	P 1		Urgent requirement to s the server reboots	olve an issu	e where
View	QEdit	Edit	10455	Bugs		Tracker	Database	11/17/12 21:2	27	P 2	Low	Testing found an issue of the field named REQ	with the mar UIREMENT	nagement
View	QEdit	Edit	10627	Bugs		Tracker Enterprise	API	11/17/12 21:2	29	P 3	Low	The sample file has an	error	
View	QEdit	Edit	10545	Bugs		Tracker	Database	11/17/12 21:2	25	P 3	Medium	Additional field on scree order form		0
View	QEdit	Edit	10285	Customer Is:	sues	Tracker		5/1/12 18:31		<u>D2</u>		Customor collect to one	ho did pot e	ceive
						Enterprise				oort of bugs b		\$78		
View	QEdit	Edit	10165	Bugs		Tracker Enterprise	GUI	11/17/12 21:		nting new, open umentation	and fixed bugs (	only		dule, all
Count	6 recor	da							_				6	
Count	o recor	us								dware			4	
										kaging			16	
									Soft	ware			56	
									-				13	///
									Gra	nd Total			95	

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.

Update User C	Cancel	Print Page			Chai	nge user's details	: BSMITH (Enabled)
BASIC INFOR	ΝΔΤΙΟΙ		SONAL OPTIONS	REPORT OPTIONS	NOTIFICATION OPTIONS	PRIVACY GROUPS	1
Division in ou			Source of Homo				
	Text	size 김	Medium 💌				
	Langu	age ?	English(United State	s) 💌			
	Time z	one 김	(GMT -8:00) America	/Los_Angeles	•		
	Date for	mat 김	Short w/time: 3/25/13	3 8:10 PM	-		
Custo	om date r	nask 🕐					
Time in 24	4 hour fo	rmat <b>?</b>	🔿 Yes 📧 No				
Chart / PDF	F output	font 김	Lucida Sans	•			
	Start p	age 김	Home Page 💌	·			
Workspa	ace Se	ttings					
Default	lt Worksp	ace 김	Bugs Workspace 💌				
Drilldown fr	from Rep	orts ?	Reuse the same	workspace panel 🔿	Create new workspace panels		
		1		_			
· · · · · · · · · · · · · · · · · · ·			7				
Update User C	Cancel	Print Page					

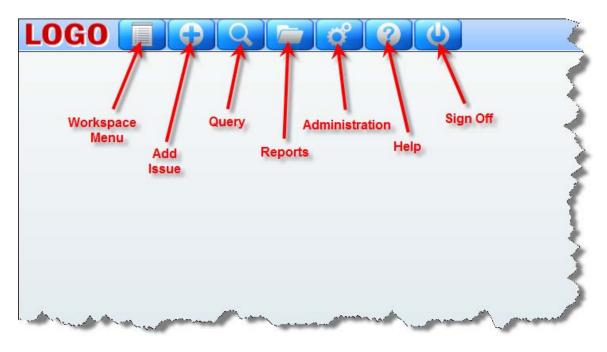
Setting where you start in ExtraView

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 presenation 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.

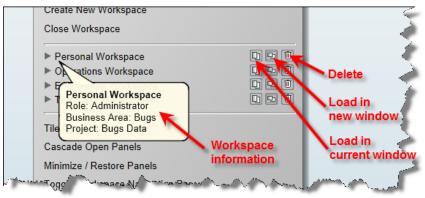
Engineering Workspace	
Search for ID #	
Role Administrator	
Business Area Bugs	
Business Area Dugs	
Save Workspace	
Save As a New Workspace	
Create New Workspace	
Close Workspace	
▶ Helpdesk	
Personal Workspace     Operations Workspace	
Engineering Workspace	
► Test Case Management	
Customer Workspace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

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:



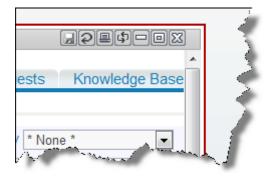
Workspace navigation

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
- The second button loads the workspace into a new browser window or tab
- 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

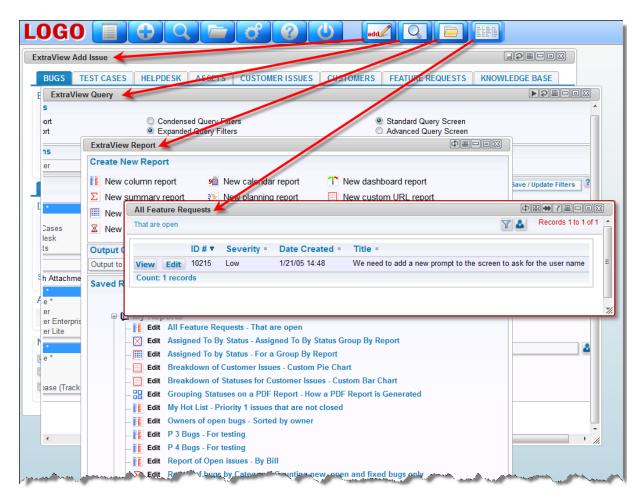
### **Managing Panels**

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	$\checkmark$	$\checkmark$ <sup>1</sup>	$\checkmark$ <sup>2</sup>	$\checkmark$
Summary Report	$\checkmark$	$\checkmark$ <sup>1</sup>	$\checkmark$ <sup>2</sup>	$\checkmark$
Matrix Report	$\checkmark$	$\checkmark$ <sup>1</sup>	$\checkmark$ <sup>2</sup>	$\checkmark$
Quicklist Report	$\checkmark$	$\checkmark$ <sup>1</sup>	$\checkmark$ <sup>2</sup>	$\checkmark$

- 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 drag-and-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

		۵ ۲	Disp
	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

PetraView Update Issue - 107	23
ID # 10723	Date Created Jan 3, 2013
Bug Details	
Category Documentati 🗸	Priority P 4
Title Add Business Calend	ar - Test Case Failure
Product Tracker Lite 🔽	Module Installation
	4
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.

LOGO Account: Bill Smith Administrator	~
Search 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 * 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 *	
DETAILS COMMENTS TEST CASE RELATED ISSUES RELEASE FIX INFO SOURCE CONTROL RELEASE NOTES	
Description	
Description Upload	
Attachments	
Add         Thumbnail         File Description         File Name         File Size	
Notifications	
Generate Email 🗹 CC Email	
Include self on interest list Add users to interest list	
Include Customer users in notification  Mailing List  Bill Smith ;	
Submit 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**

LOGO	)			Searc	Account: B th for ID #	ill Smith Administrator Bugs
Home	Add Query Report Workspace	· Ad	ministration • Hel	p - Sign Off	* Select a re	port *
Submit Print	Add a Helpdesk Ticket				Ext	traView Add Issue
Bug Deta	Add a Bug					
Cate	Add a Test Plan		Priority * None *	Severity	* None *	$\checkmark$
	Add a Test Case					
Pro	Add an Asset	F	Platform * None *	Customer Name		۹.
Release Fo	Add a Customer Issue	Assig	gned To * None *	Owner	* None *	
	Add a New Customer					
DETAILS	Add a Feature Request	JES	RELEASE FIX INFO	SOURCE CONT	ROL RE	LEASE NOTES
Descriptic	Add a Knowledge Base Item					
Description Upload						

### **Tab Selection**

LOGO	/	Account: Bill Smith Administrator V Search for ID # Bugs V
Home · Add · Query · Report · Prorkspace	e · 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 Mone

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.

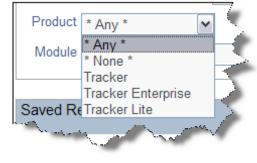
# **Field Types**

### 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.

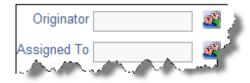


A list field allows you to select a single member of the list, by clicking on the entry you want to select. List fields can be stand-alone, or they can form part of a relationship, where the members of the list either alter the contents of another list (i.e. the field is a parent of another field), or 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**

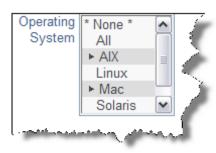


Popup fields are a variant of the List display type field. Popup lists are typically used for large lists where the number of entries makes a standard list difficult to search through, or visually awkward within a browser window.

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 typeahead 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 and number of values within the list.

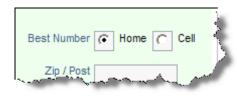
### Multi-value list fields



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 non-selected 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**



Image fields allow the storage of an image file inline, within an issue. When you click on the is button by the field label, a popup allows you to select the image from your computer that 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 is 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 **H** 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 Calendar Popup

Date Calendar

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 *Popup with* absolute, and are not corrected for the user's time zone. Also, they do *time* 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.

Assigned To * Any *	V Filentest	In Historoft	Internet Ev	plarar					
* Any *	xtraView -	Microsoft Inter	net Explorer						2
Committed * None *	okup Us	r Account D	irectory						-
Release * Current User Na	me *								
Abigail Domine Adam Hahn	Use this fo	rm to search the dir	ectory for user	s. Enter information you know	v about the use	r. The more info	ormation you		
Adam Hami		nore likely you are t						Nerdvana	>>
Allan Rofer									_
Allen Johnson				me as you know. For examp				POWERED BY	-
Andrea Palmer	match 'Smi	h', 'Smile', etc. You	can use an "" a	is a wildcard pattern in your	search. Search	ning is not case	sensitive.	-Extrav	ev
Andy Zhang	1 APR 1							Your Process Your	Workfit
to you - Assig Annemarie Alexa		Search							
Anthony De La Co alls - Client Ins Arkell Rasiah		st Name							
Area Markoff		L							
us Update - V Art Anderson	Fir	st Name							
Calls by Date Bakshi Kohli									
Issues (R) - Bazile Lanneau		User ID						Q	
Ben Clements									
Issues by McBen Sweet		Sort By Last Nan	ne 💌			-	1		
Bill Duncan Bill Miskovetz								38	
Issues - Ope Bob Brunson		Sear	ch for Account	Clear Form Can	cel				
List - Current Bob Weidenfeller								~	
Bruce Brooks	1								
s Running 4.2 Carl Koppel									
n Issues - On Cindy Norman	Search R	esults - Click on th	e User ID you w	vant to select					
clayton Wagar conted by Me Comm Energie	User ID	Name	Phone	Email	Pager	Mobile		C	
Crais Hermondo	BLAND	Brian Land	315-480-56 36	5 bland@abcde.com	315-480-5636	315-480-5636			
by you - Issu Craig Hammonds Craig Smith	DLATOUR	Diana LaTou	r 315-480	Dit96@extraview.com					
vileenae Wolf Romantan	JAMES LA	RON James Baron	315-480-5836	baron@fffffff.com	315-480-5636				
Lange and the	JEFFREY.	.ITTLE Jeffrey Little	315-480-5636	Jeffrey.Little@eddddn.com					
hand and the	KLONG	Ken Long		ken.long@qqqqq.com					
Drop-down se	elect list	ANGE Robert Lang	e 315-480-5636	rlange@extraview.com	315-480-5636				
T IT IT IT IT	SMON.LU	Simon Lush		Simon.Lush@xsdp.com					
	TRINALLO	REN Trina Loren	640-230-7039	Tirzah_H_Lusen@gsk.com		315-480-5636			
	WLEE	Willian Lee		william.lee@ama.com					
	YLIN	Yon Lin	315-480-5636	6 ylin@ydfgh.com	315-480-5636	315-480-5636			
							~		
	pne					🚽 M	y Computer		~
	( <b>@</b> )						01 0	Internet	

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 into a text field, then it will appear as <u>http://www.mycompany.com</u> or <u>www.mycompany.com</u> 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 <u>http://www.mycompany.com</u> 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.

## 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 type looks like this on the screen:

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

HTML Area field

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				
Notification	•	Generate Em	nail	CC Email			<u>a</u>
	Г	Include self	on interest list	Add users to interest list			<u>188</u>
		Include Cust	omer users in notification	Mailing List	Bill Smith ; Chris Robinson	n ; Mary Brown ;	
					Susan Green		
					Submit Clear F	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

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**



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	
Ste	tatus	^
	Open — Fixed/Pending — Duplicate — Not Fou	nd
		~

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 populated 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**

Administrator Search for ID # Bugs	< <
Home · Add · Query · Report · Workspace · Administration · Help · Sign Off · Select a report *	~
ubmit Print Page ExtraView Add Issue	?
Bug Details	
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 *	
DETAILS COMMENTS TEST CASE RELATED ISSUES RELEASE FIX INFO SOURCE CONTROL RELEASE NOTES	
Description	
Description Upload -+ Screenshot	
Attachments	
Add         Thumbnail         File Description         File Name         File Size	
Notifications	
Generate Email 🗹 CC Email	
Include self on interest list Add users to interest list	
Include Customer users in notification 🗌 Mailing List 🜌 Bill Smith ;	
ubmit 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 Update & Continue	Delete Clone Email H	History Close Print Pa	age		L	ExtraView Up	odate Issue ?
ID # 10736	Date Created Ja	in 20, 2013	Last	Changed By Bill Smith	Last	Modified Jul 13,	2014
Bug Details							
Category Software	P	riority P 3	Severity Me	dium 🔽	Customer Name Chi	rysler	٩
Title JavaScript error	when you load the edit p	age					
Product Tracker	М	Iodule GUI	✓ Platform Ma	icintosh 🔽	Release Found		
Originator Bill Smith	Assign	ed To Bill Smith	Owner * N	lone *	Privacy Pri	vate	~
Resolution * None *	Needs Doc Ch	hange 🗌	Ranking				
STATUS TRAN	SITION - Click on new	status to transition the	e issue				
Status		New — Open —					
		New Open —	Fixed Closed -	Duplicate Not Found			
DETAILS COMMENTS	TEST CASE RE	ELATED ISSUES	RELEASE FIX INFO	SOURCE CONTROL	RELEASE NOTES	HISTORY	WORKFLOW
Release Fix Repeating	Row Details						
Delete Requested Release	Committed Release	Release Assigned To	Release Status	Notes			
* None * 🗸	* None *	* None *	* None *				
Add another record							
Attachments							
				511 01	0		
Add Hist Thumbna	II File Des	scription	File Name	File Size	Created By	Date Created	
Notifications							
	Generate Em	nail 🗹	CC Email			2	
	Include self on interest	list 🗌 🛛 Ade	d users to interest list			2	
Include Cu	stomer users in notificat	ion 🗌	Mailing List 🔤 Ma	ry Brown ; Chris Robinson	; Bill Smith ;		
Update Update & Continue	elete Clone Email H	distory Close Print Pa	ICE				
(at any later of a countred) (							

#### 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 Paç		Custom Email
Directions		
	, or compose a new email by entering text directly. User's email addresses that are within the issue can be selected mail addresses as needed. The email you send will be added back into the issue as an attachment.	I from the mailing list. You
You may upload attachments	to send out with your email. Attachments will also be added into the issue associated with the email.	
ID #	10733 - Test the time to load the admin screen	
Enter addresses, one per line	^	
datation of a second second second second		
dditional email addresses <b>?</b>	* None * Sally Hunt John Customer Bill Smith	
CC Email addresses ?		
Subject line ?		
Select email template ?	* Blank *	
Send standard notification 👔		
Email body ?	🕞 Source 🝙 🐹 🔓 🕼 👘 🍬 Styles 🔹 Format 🔹 Font 🔹 Size 🔹	A- M- 53
	B I U S X₂ X² Ix 달 등 ⊕ 19 83 달 ± ± ≡ ■ ∞ ∞ ₱ 🖬 🎞 🎞	Ξ 😳 Ω 😳
Attachments		

Preparing to send email from the edit screen

nd Email Cancel Print Pag	e	Custom Email					
Directions							
	, or compose a new email by entering text directly. User's email addresses that are within the issue can mail addresses as needed. The email you send will be added back into the issue as an attachment.	be selected from the mailing list. You					
You may upload attachments	to send out with your email. Attachments will also be added into the issue associated with the email.						
ID #	10733 - Test the time to load the admin screen						
Enter addresses, one per line	$\sim$						
dditional email addresses ?	* None * Sally Hunt John Customer Bill Smith						
CC Email addresses 🔋							
Subject line ?	Thank you for your submission						
Select email template <b>?</b>	New feature request thank you						
end standard notification 👔							
Email body ?	Source 🗊 🗶 🔓 🛱 🛱 ፍ 🄶 Styles , Normal 🕞 Font	Size - A- A-					
	B I U S X₂ X² IX 등 등 등 ₩ 99 00 = 5 5 5 5 0 00 00 00 00 00 00 00 00 00 00						
	Dear \$\$ORIGINATOR\$\$:						
	Thank you for your submission, suggesting a new feature to our product. This issue has been assign	ed to a manager, who will respond by					
	\$\$DUE_DATE\$\$. If you have any questions in the meanlime, please call 1-800-878-8888 and quote	request number \$\$ID\$\$.					
	Thank you,						
	Customer Support						
9.05 JG A	div p						
Attachments							
Add Thumbnail	File Description File Name File Size Created B	v Date Created					

Loading a template to send email

If you want to send an email that you compose directly, simply enter an email address (or choose users from the mailing list), enter the subject line and enter the text. You can also enter people for a CC list for the email. When complete, simply press the **Send** button. The email you have just sent is added back into the issue as an attachment, as a record of the communication. Your administrator may have defined a range of templates. These are prepared emails that you can choose within the list entitled **Select saved email template**. If you choose a template, its text will be placed within the template text box. 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 Jan 8, 2013 Bill Smith	┝→	Fixed Nov 10, 2013 Bill Smith	┝→	Open May 22, 2014 Bill Smith	l
						1

Simple Summary of History

Cancel Full History	Abbreviated Display	Abbreviated Side-by-S	ide Display   Print F	Dage
Displaying records 1 t	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 ob	serve 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	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 ob	serve 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 Smithans	Bill Smith	Bill the Action		and the grant of the second

### History, displaying complete details

Cancel Full History Abbreviated Display	Abbreviated Side-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: [Etra View 10731]: Error when creating a record Role used: Customer Support From User: admin@my_company.com Sent to: <u>Qhris Robinson</u>	
	Timestamp: Apr 30, 2015 Subject [ExtraView 10731]: Error when creating a record Role used: Administrator From User: admin@my_company.com Sent to: <u>ManyBrown</u> , <u>Bill Smith</u>	
Alt ID #	XXX-10731	
Last Changed By	Bill Smith	
Last Modified (TIMESTAMP)	May 22, 2014	
Notification History		
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>	
	Timestamp: May 22, 2014 Subject: [ExtraView 10731]: Error when creating a record Role used: Quality Assurance From User: admin@my.company.com Sent to: <u>Mary Brown</u>	
And a state of the second s	and and the second of the standard and a strend and a strend and the second of the second strend and the second	and a start of the

# History displaying changes only

Cancel Full History Abbreviated Display	Abbreviated Side-by-Side Display Print Page	History of changes for Alt ID #
Displaying records 1 to 20 of 25 🕨		
litle	Previous Value	New Value
Alt ID #		XXX-10731
ast Changed By		Bill Smith
ast Modified (TIMESTAMP)	May 22, 2014	Apr 30, 2015
Severity	Low	High
Notification History	Timestamp: Apr 30, 2015 Subject: [ExtraView 10731]: Error when creating a record Role used: Customer Support From User: admin@my_company.com Sent to: <u>Chris Robinsion</u> Timestamp: Apr 30, 2015 Subject: [ExtraView 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>	
ſitle \lt ID #	Previous Value XXX10731	New Value XXX-10731
Last Changed By		Bill Smith
Last Modified (TIMESTAMP)		May 22, 2014
Notification History		
Title	Previous Value	New Value
Alt ID #		
ast Changed By		Bill Smith
ast 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 strange of the second states, the second states, the	Timestamp: May 22, 2014 Subject: [EntraView 10731]: Errorn hen creation a record	An and the second s

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 <b>No</b> and <b>Undefined</b> checkbox values are represented with a <b>No</b> on the output. When an issue is first created, the <b>No</b> value is colored red. From that point, the <b>No</b> value is displayed in black, and a green <b>Yes</b> 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 <b>Yes</b> 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 <b>Yes</b> will appear on the output. From the point forward where a checkbox value is changed, the new value always appears in green.

# **Relationship Groups**

### <u>Add new comment</u>

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:

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
porter Details			
Reporter / Patient			
First Name	Last Name	Clinic Location * None *	Reported Unknown
Telephone	Email Address	Address	Country USA
Reporter HCP?		=+	~
ident Details			
Title			Assigned To * None *
ncident Summary - Click to Expan	d		
harma Product Details - Click to E	XD-rd		
Add a New Adverse Event			Adverse Events
nere are no related items			
achments			
Add Thumbnail	File Description	File Name	File Size

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 Prin	nt Page		Extraview	v Add Issue
Incident CAPA Advers	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 *		Frequency * None *	Route Used Cutaneous	3
Required Hospitalization  No		Title		
Seriousness * None *	•	AE Description		^ E .
Other reason				
Event Abated * None * when Stopped				
Event Reappeared * None *	•	Relevant Tests		^
Event Outcome				
				-
Attachments				
Add Thumbnail	File Description	File Name	File Size	
Submit Clear Close Pri	nt Page			
Submit Clear Close Phi	it rage			[
ents				
Thumbnail	File Description	File N		File 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:

omit Clear I	Print Page						Extraviev	v Add Iss
ncident CAP/	A Adverse Event	MedDRA						
tient Details								
First Name	Alison	Last Name	Alexander	Date of Birth	3/3/1959		Age at Time 52 of Event	
Gende	r 💿 Female 🔿 Male	Height (cm)	167	Weight (Kg)	41		Date of Death	
	454 112 1515		aalexander@xxx.co		21 Bruce St.	*	Country USA	
					Anytown	~		
				L				
porter Details								
Reporter / Patien Same Person								
First Name	Alison	Last Name	Alexander	Clinic Locati	on * None * 💌		Reported Unknown	1 💌
Telephone	454 112 1515	Email Address	aalexander@xxx.c	om Addre	ss 21 Bruce St.		Country USA	
relephone								
					Anytown		_	
Reporter HCP1		]	g		Anytown		-	
Reporter HCP?		]			Anytown		T	
Reporter HCP	· · · · · · · · · · · · · · · · · · ·				Anytown	Acc		
Reporter HCP					* Anytown	Assi	* igned To * None *	•
Reporter HCP?	· · · · · · · · · · · · · · · · · · ·				+ Anytown	Assi		V
Reporter HCP?	Title Patient reports swelling				Anytown	Assi		×
Reporter HCP?	Title Patient reports swelling y - Click to Expand Details - Click to Expand				* Anytown	Assi	igned To * None *	▼ se Event
Reporter HCP? cident Details	Title Patient reports swelling y - Click to Expand Details - Click to Expand	g 2 hours after tak	ing dose		* Anytown	Assi	igned To * None *	
Reporter HCP? cident Details	Fitle Patient reports swelling y - Click to Expand Details - Click to Expand se Event	g 2 hours after tak	ing dose		Title =		igned To * None *	
Reporter HCP7 cident Details ncident Summar Pharma Product I Add a New Adver	<ul> <li>Patient reports swelling</li> <li>y - Click to Expand</li> <li>Details - Click to Expand</li> <li>se Event</li> <li>Date Created =</li> </ul>	g 2 hours after tak	ing dose	vent Outcome =	Title =	s swelling 2 hour:	igned To * None * Adver	
Reporter HCP cident Details neident Summar Pharma Product I Add a New Adver View Edit	Patient reports swelling         y - Click to Expand         Details - Click to Expand         se Event         Date Created =         Sep 23, 2011 12:00:00 Å	g 2 hours after tak	ing dose nusness = E -Serious F	vent Outcome =	Title = Patient report	s swelling 2 hour:	igned To * None * Adver	
Reporter HCP7 cident Details neident Summar Pharma Product I Add a New Adver View Edit	Patient reports swelling         y - Click to Expand         Details - Click to Expand         se Event         Date Created =         Sep 23, 2011 12:00:00 Å	g 2 hours after tak	ing dose nusness = E -Serious F	vent Outcome =	Title = Patient report	s swelling 2 hour:	igned To * None * Adver	

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

	ew Quickli	ist Report		Refresh	Group Issues	Update Issues	Return	Print Page
							Reco	rds 1 to 8 of
	oen AND Busine y Bill Smith on 2	ess Area = Bugs AND A /13/06	ssigned To = Bill Sm	th				
	▼ID #	Business Area	Title				• Days	Ореп
	Priority	Customer	Status	Product	<sup>III</sup> Me	dule	<sup>III</sup> Assig	ned To
View Edi		Bugs		ed to the database can be sear	ched before it is in t	he approved state	11	
	P 2		Open	Tracker			Bill Smith	
View Edi	10515	Bugs	Here is a training e	example at Toyo in Tokyo			18	
	P 3		Open	Tracker			Bill Smith	
View Edi	10489	Bugs	Customer receives	s error CX3456 when they first	sign on		75	
	P 3		Open	Tracker Enterprise			Bill Smith	
View Edi	10460	Bugs	Reporting problem	with the interface module in the	e database integratio	n module	75	
	P 3		Open	Tracker Lite			Bill Smith	
View Edi	10254	Bugs	Problem with the C	Oll widget			353	
	P 1		Open	Tracker			Bill Smith	
View Edi	10232	Bugs	A program except lengthy report	ion occurs when the user selec	ts the Clear button	after producing a	381	
	P 2		Open	Tracker	Datab	ase	Bill Smith	
View Edi	10231	Bugs	The link from the re	eport page "Support" button is b	roken		381	
	P 3		Open	Tracker	GUI		Bill Smith	
	and second second	Bugs	I found a bug in th	e database table definition name	ed XYZ		385	
View Edi	t 10216	Dugo			Datat		Bill Smith	

## Quicklist Report screen

A screen similar to the following appears:

ert issues inte	o a new o	or existi	ing relation	ship group	ì						Update	Cancel	Print P
Create new	/ Relationshi	ip Group	C Merge v	vith existing Re	elationship (	Group							
Fixed database	Title	ne-to-Many	M										
Page size 20	to check or	uncheck a	II the issues in		nip group. Y	'ou can view	any issue	to check t	the details b	y clicki	ng the Iss	ue #.	
⊡- Issue 1 to 7	to expand al		s in the tree										
			zation to provid	de new furniture	e for new en	mplovee - G	oria Menen	ndez					
				de a new teleph					enendez				
				de a new comp									
			ner needs help										
			Il be mapped to										
	0269 (Oper	n) New en	try point to be	created									
											Update	Cancel	Print P

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.

ert issues	into a r	new or	existing relationship group	Update	Cancel	Print Pag
C Create	new Relat	ionship	Group Group Group			
Existing Gro	oups * Se	elect *				
	nere to che		o not want to include in the relationship group. You can view any issue to check the details by clicking check all the issues in the list	the Issue #		
E- Issue 1 t	to 7		ne nodes in the tree			
<b>-</b>		(Open)				
			Authorization to provide new furniture for new employee - Gloria Menendez			
<b>v</b>			Authorization to provide a new telephone extension for new employee - Gloria Menendez			
			Authorization to provide a new computer for new employee - Gloria Menendez			
- 17	10300		Customer needs help			
\[         \]     \[         \[         \]     \[			This will be mapped to EV			
	10269	(Open)	New entry point to be created			
				Update	Cancel	Print Pag

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:

Jpdate Related	Issues					Update Issues	Cancel	Print Page
					em you are updating. You can ite, you can set the scope of		to all the iter	ns, and
1 - Update Options								
<ul> <li>Update this item o</li> </ul>	nly (Press t	the 'Update Issue	es' button after se	electing this option)				
C Update all related	items							
2 - Check the box to	add the f	ollowing Com	ments to all rel	ated items when you up	odate			
								~
								~
	us d as	ID #	Status Fixed	Assigned To Greg Goldberg	Title	es the Go button he wai		^
		dit 10466 dit 10468	Open	Greg Goldberg		being entered for Jeff	is 2 secono	s 📃
4 - Check the field	ls in the li	st below that y	ou want to upo	late to the same values	in the issue being update	d. The new value is s	shown.	×
Status F	ixed							
	mplemented							
Assigned To C								
		son						
5 - Notification opti-	ons							
<ul> <li>Notify users on th</li> </ul>	e current is	sue only						
Notify users on al	the issues	in the relationsh	nip group					
Notify users on th	e parent iss	sue only						
			-	21				
				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.

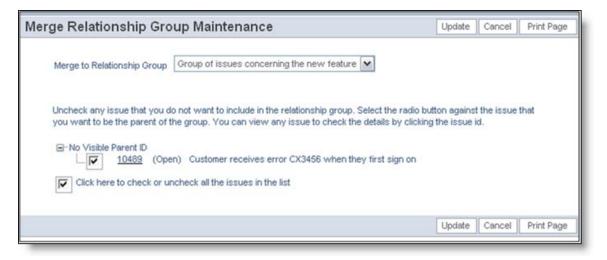
The following screen appears:

Email Relationship Groups	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 the Alter 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 will be pre-selected in filter criteria.If you want to select all of the ID # objects from the current relationship group or 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:

plit Relat	ionship Group Maintenance	Update Cancel Print	nt Page
Title Owner	Bill Smith		
parent o	any issue that you do not want to include in the relationship group. Select the r the group. You can view any issue to check the details by clicking the issue io isible Parent ID		
C	Interest of the second seco		
		Update Cancel Print	nt Page

### 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 look like this:

Submit Print Page	
Bug Details	
Return Print Page	Upload Attachment(s) 2
File Attachment Upload ?	
	ENOTES
	Upload Screenshot
Selected file(s) Description	
Submit Print Page	

### Adding attachments

The interface support two means of adding file attachments to be uploaded. First, the **Add files** button provides access to the file system of your computer. From there you may select up to 10 files to be uploaded in one operation. Secondly you may drag up to 10 files over the popup and drop them there, to prepare them for upload. Once you have the files prepared, you may 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.

ncel Print Page		Upload Attachment(s) ?
ile Attachment Uple	pad ?	
+ Add files	Cancel	
PDF	AWS_Disaster_Recovery.pdf (1.16 Mb)	×
	Book1.csv (94 b)	×
DOC	CA Database Requests.docx (16.76 Kb)	×
PDF	cms855a.pdf (784.23 Kb)	×
	Control cChart Report Specification docx (354-57 Kb)	
elected file(s)	Description	
WS_Disaster_Recovery.	pdf AWS_Disaster_Recovery.pdf	
Book1.csv	Book1.csv	
A Database Requests.do	CA Database Requests.docx	
ms855a.pdf	cms855a.pdf	
Control cChart Report	Control cChart Report Specification.docx	
ALC: NOT ALC	m	•

## **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.

Update	Update & Continue	Update & Next Dele	te Clone Email	History Close	Print Page		ExtraView Update Issue
Area Bugs							
_ Issu	e						
ID ;	# 10557	Date Created 4/17/09 9:02 PM		Last Cha	nged By Bill Smith	Last Modif	ied 4/17/09 9:08 PM
Bug	Details						
Categ	gory Software	Pric	rity P 3 💌	Severity	* None * 💙	Custon	ner Corona 💌
	Title There is a defect in the a	admin module when a user make	es an error				
Proc	duct Tracker	Mod	lule Database 🖌	Platform	Windows 98 💌	Release Fou	Ind
Origina	ator Bill Smith	Assigned	To Bill Smith	Owner	* None * 💌 🕨	Priva	Private
Resolu	ition * None *	Needs Doc Cha	nge 🗖			Stat	tus Open 🖌
	STATUS TRANSITION -	Click on new status to transition	the issue				
Sta	atus						
		New	Open — Fixed	- Closed -	Duplicate	Not Found	
					. Y =		
Det		est Case Related Issue	s Release Fix Inf	fo Source Contr	ol Release Notes	History Workflov	V
	oreviated History						
Histo	New	Open					
	Bill Smith 4/17/09 9:02 PM	<ul> <li>Bill Smith 4/17/09 9:08 PM</li> </ul>					
Atta	chments						
Add	Hist Thumbnail	File Description		File Name	Created By	File Size	Date Created
- Noti	fication						
	enerate Email	CC Er	nail			<u>a</u>	
	clude self on interest list	Add users to interest				<u>e</u>	
🗖 Inc	clude Customer users in notifi	cation Mailing List	Mary Brown ; Chris	Robinson ; Bill Smith ;			
Update	Update & Continue	Update & Next Dele	te Clone Email	History Close	Print Page		

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.

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
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
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
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
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
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
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

Attachment history screen

## Adding Attachments - Legacy Mode

From the *add* or the *edit* screen, click the **Add Attachments** button. A popup window will be displayed. The appearance of the popup window will depend on whether your administrator has enabled the drag-and-drop file upload or has only enabled manual file upload. The drag-and-drop file upload has enhanced features, but does not work in every environment. If the drag-and-drop file upload has been enabled, but you have any problems with the feature, you can always press the Use Manual Upload button to revert to the manual upload method. The two upload screens look like this:

Cancel Print Page		Upload attachment(s,
🛃 Use manual file upload		
Drag-and-Drop Upload		
Provide a description for each or text from your clipboard. If y	owser and drop them on the shaded area below, or copy files from your sy file. You can upload a file created directly from your clipboard. Simply right ou are pasting an image, then you can use your mouse to select a portion ents with Asian character sets may need a different selection. Do not chan	t-click on the area below and paste an image of the image to upload. Most documents use
When you have selected all th	e files, press the Upload button to proceed.	
	Character Encoding UTF-8 Unicode 8-bit Transfer	•
	Select files and drag to this area, or right-click and paste them from the	clipboard
	Upload	
		Description

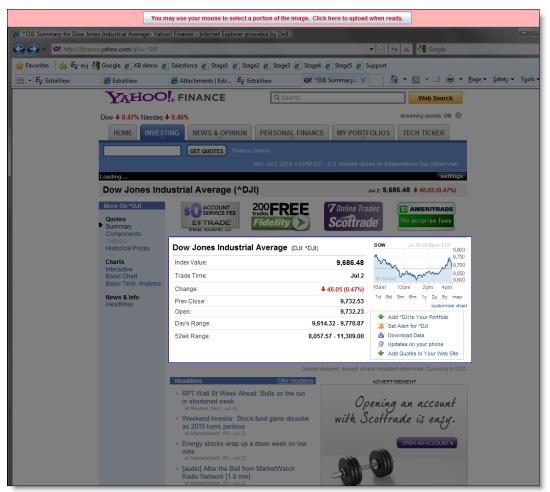
Adding attachments with drag-and-drop

ncel Print Page	Upload attachment(s)
Use drag and drop file upload	
Manual file uploa	ad - select files by browsing
	electing one file at a time. If necessary, select the character set of the file being
Click Browse to select a file	Character Encoding
Browse	UTF-8 Unicode 8-bit Transfer
Selected file(s)	Description

Adding attachments manually

### **Drag-and-Drop Attachments**

- From a window that displays files on your local computer, or from the desktop, select one or more files and then drag them on top of the popup window. When over the upload image, release the mouse button and all the selected files will be displayed on the screen, ready for upload. Note that you can even select complete folders and drag-and-drop these to be uploaded
- Use the standard features of the operating system of your computer to capture a screen, or part of a screen. For example, you might use the **Prnt Scrn** or **Alt-Prnt Scrn** options in Microsoft Windows, or the **Command-Shift-3** option on a Macintosh to capture all or part of a screen. This places the captured image on the clipboard of your computer. Move your mouse over the drop area in the popup, then press the right-hand mouse button and select the **Paste** option. A new window will open showing the image you have captured. Either select the entire image with the button at the top of the window or use your mouse to crop a portion of the screen and then select the highlighted portion. The image on the clipboard is converted into a file that can be uploaded.



Cropping an Image that was Pasted into the File Upload Utility

You can remove files incorrectly selected with the **Remove** button. Once you have the correct files, you perform the upload by pressing the **Upload** button.

### **Manually Adding Attachments**

From the popup screen you add attachments by pressing the **Browse** button and selecting a file to upload. After the file appears in the lower half of the window, add a description for the file. If necessary, use the **Character Encoding** select list to choose the character set of the file being uploaded. For most purposes the default value of **UTF-8 Unicode 8-bit Transfer** is the correct value. Asian users will often find they need to select a different value. You can remove files incorrectly selected with the **Remove** button. Up to ten files may be selected for a single upload session. Once you have the correct files, you perform the upload by pressing the **Upload Attachment(s)** button.

# **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.



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:

Closed	I — Duplica	te — N	lot Found	, ,
	Windows Interr	net Explorer	×	
ource	Issue 1	0557 cloned as	Issue 10564	/orkfic
		ОК		
		and the second	- the state of the state of the	

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	
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	3
SUB-ISSUE INFORMATION	/
Delete         Requested Release         Committed Release         Release Assigned To         Release Status         Notes           I         1.1         Image: Status         George Miller         Image: Open transmission         Image: Status         Image: Status	

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 *	×	
Select new to update [		(unit)	
			Court Dittour
			Cancel Print Page

### Selecting a field to update

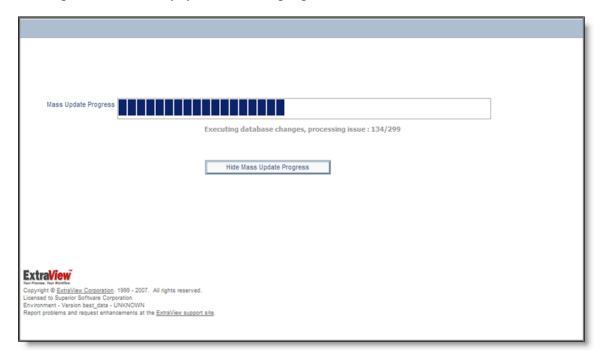
Select the Assigned To field from the list and the screen will redisplay, showing something similar to:

ahaal			that you do not your	nt to update to the new value				
icheci	k any	ID #	Current value	It to update to the new value Title	Business Area	Project		
/iew	~	10454	Bill Smith	After rebooting the processor, the screen will show a wrong module	Bugs	Bugs Data		
/iew	~	10373	Bill Smith	Notifications are not sent upon submission.	Bugs	Bugs Data		
/iew	•	10318	Bill Smith	This is a test	Bugs	Bugs Data		
liew	•	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		
	7	Click her	re to check or unche	ck all the issues in the list				
Ger	nerat	te Email						

Mass update screen

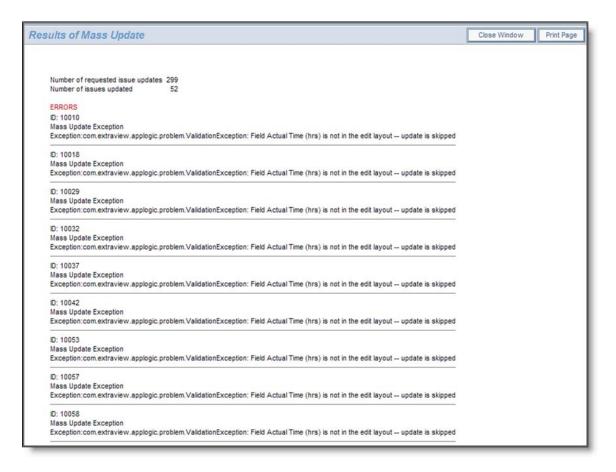
From the select list labeled **New value for Assigned To**, select the person you want to reassign the issues to. You can view any of the issues to check whether they should be part of the update, and you can uncheck any or all of the issues. If the field you are trying to update is dependent upon another 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 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.



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.

# **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.

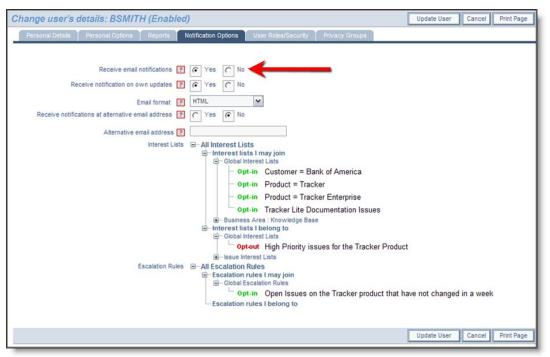
# **Turn Notification On & Off**

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



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 a User's Details screen

- 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 Print	Page
Personal Details Personal Options Reports N	lotification Options User Roles/Security Privacy Groups		
Receive email notifications 2 Receive notification on own updates 2 Email format 2 Receive notifications at alternative email address 2 Alternative email address 2	Optification Options     User Roles/Security     Privacy Groups       Image: Security     Yes     No       Yes     No       Image: Security     Yes       Yes     No       Image: Security     Yes       Yes     No       Image: Security     Yes       Image: Security     Yes <tr< th=""><th></th><th></th></tr<>		
	Interest lists I belong to     Global Interest Lists		
	Opt-out High Priority issues for the Tracker Produc	ct	
Escalation Rules		have not changed in a week	
	Escalation rules I belong to		
		Update User Cancel Print	Page

Change a User's Details screen

- 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			
Receive email notifications ? Receive notification on own updates ? Email format ? Receive notifications at alternative email address ? Alternative email address ? Interest Lists	Obtification Options     User Roles/Security     Privacy Groups       Image: Security     Yes     No       Image: Yes     No<		l in a week	
	- Lacalation rules r belong to			
		Update User	Cancel	Print Page

Change a User's Details screen

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:

ile <u>E</u> dit <u>V</u> iew <u>I</u> nsert I	Format <u>T</u> ools <u>A</u> ctions <u>H</u>		e to add new user Message (HTML)	_ 0 2					
From:          ExtraView Support [support@extraview.com]        Sent:       Wed 2/15/2006 9:08 PM         To:       carl@sesame.com       Cc:       Cc:         Co:       Cc:       Cc:       Cc:									
Subject: 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 Fix Verified	Days Open 1	Changed by Chinesee Natidu Kinemidi						
Defects Category	Cust. Sup. Issue ID #	Customer	Chinnam_Naidu Kimmidi						
Product Bug		Catalytic Software							
_		outarytic Boltmarc							
Title	_ IE Cnk-Unable to add n	ow 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						
	0 All								
Requested Release	Committed Release	Branch Status	Fixed-in build #						
4.3.6.2	4.3.6.2	Fixed	30						
Description		1							
Test data: URL: <u>http://qa.extraview.net/m1-a-ms/ExtraView</u> User Id: qa Observed defect: I am unable to add new user and it's displayed a popup message saying "Unable to add or update user. The most probable cause is that you exceeded the number of available user licenses." when trying to add new user.									
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 pleas	e view attachment.								
Comments									
2/15/06       Chinnam_Naidu Kimmidi         Tested on Version 4.3.6.2       Build #30 on site <a href="http://ga.extraview.net/m1-a-ms/ExtraView">http://ga.extraview.net/m1-a-ms/ExtraView</a> 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 Impact									
N/A									
cc: <u>Carl Koppel</u> ; <u>C</u>	hinnam_Naidu Kimmidi ; [	<u>Ellin Tjondrokusumo</u>							

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
OS:
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.
 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
 05:
 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.
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.

Personal Details       Personal Options       Reports       Notification Options       User Roles/Security       Privacy/Groups         Receive email notifications       Pressonal Options       Pressonal Options       Pressonal Options       Pressonal Options         Receive notification on own updates       Pressonal Options       Pressonal Options       Pressonal Options       Pressonal Options         Receive notifications at alternative email address       Pressonal Options       Pressonal Options       Pressonal Options         Alternative email address       Pressonal Option       Custop Option       Custop Option       Custop Option         Interest Lists       Pressonal Interest Lists       Pressonal Interest Lists       Pressonal Option       Custop Option         Opt-in       Product = Tracker       Opt-in       Custop Interest Lists       Pressonal Option         Opt-in       Product = Tracker Enterprise       Opt-in       Product = Tracker Enterprise       Opt-in         Opt-out       High Priority issues for the Tracker Product       Pressonal Interest Lists       Presson Interest Lists         Opt-Out       High Priority issues for the Tracker Product       Presson Interest Lists       Presson Interest Lists
Receive notification on own updates ? Yes No Email format ? HTML Receive notifications at alternative email address ? Yes No Alternative email address ? Interest Lists
<ul> <li>⊟ Escalation rules I may join</li> <li>⊟ Global Escalation Rules</li> <li>□ Opt-in Open Issues on the Tracker product that have not changed in a week</li> </ul>

Change a User's Details screen

## **Disable Automatic Email Generation**

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

Notification	Generate Emai	1	CC Email				<u>ai</u>			È.
	🔲 Inch Bennston	ner users in notification	Mailing List	George Miller ; !	fary Brown					5
	[	Update Delete	Clone A	Add to Interest List	Manage Relationship	Groups	mail History	Close	Print Page	$\geq$
L. Maria		And the second s	and the		the state of the second second	and the second s	A strange of			

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.

Notification	Generate Email	CC Email	2
[	Include Customer users in notification	List @ George Miller ; Mary Brown	¥
	Update Delete C	one Add to Interest List Manage Relationship Groups	Email History Close Print Page
L' Maria		and have the state of the second s	A former and the second s

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.

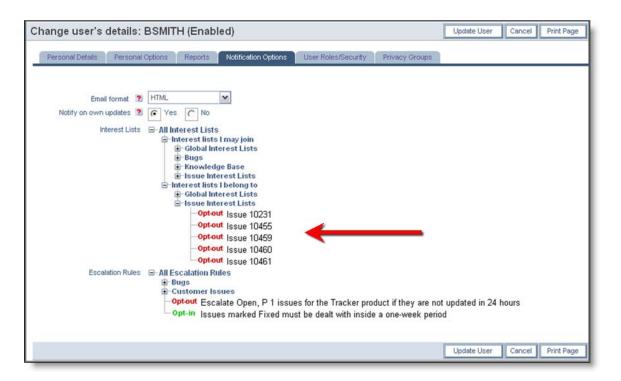
### **Issue Interest Lists**

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.



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.

	Notification Generate Email	CC Email	24	Z.
	Include self on interest list	Mailing List 🙆 George Wer;	Mary Brown	T.
	Include Customer users in notificat	ion		Þ
			Clone Email History Close Print Page	ŀ
1	Second and the second sec	and the second	and a second a second and the second and the second and the second of the second of the second of the second of	

Issue Edit screen

The following screen appears:

end Email Cancel Print Pag		Custom Email
	or compose a new email by entering text directly. User's email addresses that are within the issue can be select all addresses as needed. The email you send will be added back into the issue as an attachment.	ed from the mailing list. You
You may upload attachments t	o send out with your email. Attachments will also be added into the issue associated with the email.	
ID #	10733 - Test the time to load the admin screen	
Enter addresses, one per line	$\langle \rangle$	
dditional email addresses <b>?</b>	* None * Sally Hunt John Customer Bill Smith	
CC Email addresses ?		
Subject line <b>?</b>	Thank you for your submission	
Select email template ?	New feature request thank you	
Send standard notification ?		
Email body ?	😡 Source 🝙 🐰 🗅 💼 🛱 🙀 🐟 🔶 Styles 🔹 Normal 🔹 Font 🔹 Size	- <u>A</u> - <u>B</u> - <u>X</u>
	B I U S x₂ x² Ix ≔ ≔ ⊕ 99 88 = ± ± ≡ ∞ ∞ № ⊡ ⊞	
	Dear \$\$ORIGINATOR\$\$:	and a second
	Thank you for your submission, suggesting a new feature to our product. This issue has been assigned to a ma \$\$DUE_DATE\$\$. If you have any questions in the meanlime, please call 1-800-878-8888 and quote request nu	anager, who will respond by Imber \$\$ID\$\$.
	Thank you,	
	Customer Support	
	LOGO	
	div p	
Attachments		
Add Thumbnail	File Description File Name File Size Created By	Date Created
10		

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 filtering, using the Standard Query Filters or the Advanced Query Filters.

Run Report Clear All Print Page		ExtraView Query ?
▼ Query Options		
<ul> <li>Quicklist Report</li> <li>Detailed Report</li> </ul>	<ul> <li>Condensed Query Filters</li> <li>Expanded Query Filters</li> </ul>	Standard Query Screen     Advanced Query Screen
Output ? Browser	~	
20 rows per page 🗸 🗸		
Saved Filters ? *Saved filter list * > Save	/ Update Filters	
Query Filters		Filter Multi-Valued Field Values 🍞 🗌
Business Area * Any * V Last Changed E	y [	Days Since Last Updated
Keywords		Days Since Created
Search Attachments?		
Category * Any * V Statu	IS * Any *	Originator 🔼
Product * Any * Customer Nam	e * Any * · · ·	Assigned To

Standard Filters on Query Screen

Run Report Clear All	Print Page				ExtraView Query 김
<b>V</b> Query Options					
<ul> <li>Quicklist Report ?</li> <li>Detailed Report</li> </ul>		Condensed Query Filters     Parallel Condensed Query Filters		<ul> <li>Standard Query Screen ?</li> <li>Advanced Query Screen</li> </ul>	
Output ?	Browser	•			
	20 rows per page				
Saved Filters ?	* Saved filter list * V	date Filters			
Query Filters				Filter Multi-Valued Fi Use Allowed Value	
Se	elect Field		Operator	Value	
B B	Business Area(AREA)	×	equals 🗸	Customer Issues ~	
and V	ast Modified(TIMESTAMP)	$\sim$	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</u> <u>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.

## **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.

Query Options		
<ul> <li>Quicklist Report ?</li> <li>Detailed Report</li> </ul>	<ul> <li>Condensed Query Filters</li> <li>Expanded Query Filters</li> </ul>	Standard Query Screen     Advanced Query Screen
Output ?	Browser	
	20 rows per page V	
Saved Filters ? Query Filters	Saved filter list     Personal filters     Helpdesk Issues     My filters     New issues in my queue     Test Cases     Test Plans	Filter Multi-Valued Field Values 🛐 🗌
Business Area * Any *	Shared filters Assets List	Days Since Last Updated
Keywords	Issues updated in the last 4 weeks Recent updates	Days Since Created
Search At		

Saving filter sets

	X
Save/Update/Delete Filters	Save Delete
To create a new set of saved filters, enter the name and press the <b>Save</b> button. To update an ex saved filters, choose the filter set from the list and press the <b>Save</b> button. To delete an existing s choose the filter set from the list and press the <b>Delete</b> button.	
Replace existing filter set * Saved filter list *  Create new filter set  Personal filter O Shared filter	

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 Can	el Print Page			ExtraView Column Report ?
Column Report Options					
Report title Customers and their Issues	2				
Description Uses Hierarchical Reporting					
Description Uses Hierarchical Reporting					
Browser	~	۲	Condensed Query Filters	u	Jse SLA ? * None *
20 rows per page		01	Expanded Query Filters	Transpose ro	ws/cols ?
20 rows per page		0:	Standard Query Screen		n Mobile 👔 🗆
Customers>Issues ~		۲	Advanced Query Screen	Output Report D	efinition 🔁 🗆
* Saved filter list *	Save / Update Filters				
Drag or double-click fields to select, drag	fields to remove or change order	Dra	ag or double click up to 8 fiel	ids to set sort order	
Find a field	Show field names	Find a field		Show field names	
Abstract	Customer Name	Actual Renew	- Data	0 0 ID #	
Adstract Actual Renewal Date	Customer Name	Actual Time (h			<b>`</b>
Actual Time (hrs)	Phone Number	Application	,		
Address	Customer Email	Approved by			
Application		Asset Type			
Approved by Asse * Select *	A.	Assigned To Automated			
Asse * Insert Saved Filters *		Building			
Assid Actual Renewal Date(CUST_CONT_ACT_	REN_DATE)	Bus. Priority			2 2
Attac Application(IT_APPLICATION)		Business Area			
Auto Approved by(IT APPROVED BY)		Case Status		~	
Disp Asset Type(IT_ASSET_TYPE)					
Assigned To(ASSIGNED_TO) Automated(AUTOMATED)					
Que Building(IT BUILDING)					ilter Multi-Valued Field Values 👔 🗖
Bus. Priority(FRQ_BUSINESS_PRIORITY	)				Use Allowed Values in Filters 👔 🗌
Base Business Area(AREA) Case Status(TEST_CASE_STATUS)					
Category(CATEGORY)	0	perator Value			
Cell Phone(CUST_PHONE_CELL)					
Committed Release(FRQ_COMMITTED_F Committed Release(RELEASE_FIXED)	RELEASE)				
Vissi Contact Phone(IT_CONTACT_PHONE)		Perform aggreg	ate function on results ?	Include parents without children	2
Contact(CONTACT)		Select Fie			Operator Value
			-		
Created Start Date(START DATE)		Business	Area(AREA)		✓ equals ✓ Customer Issues ✓
Created Stop Date(STOP_DATE)		_			
Addre Created from ID #(CREATED_FROM_BUG Addre Customer Contact(CUST_CONTACT_NAM	3_ID)				
Applic Customer Email(CUST_EMAIL)					
Appro Customer Name(CUST_LIST)					
Asset Customer Name(CUST_NAME) Asset Date Closed(DATE CLOSED)					
Asset Date Closed(DATE_CLOSED) Date Created(DATE_CREATED)					2

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.

Run Report Clear All Prin	t Page			ExtraView Query <b>?</b>
Query Options				
<ul> <li>Quicklist Report ?</li> <li>Detailed Report</li> </ul>		Condensed Query Filters ? Expanded Query Filters	Standard Que Advanced Que	
Output ?	Browser 🗸			
	20 rows per page 🗸 🗸			
Saved Filters ?	* Saved filter list * V	ate Filters		
Query Filters			Filter N	lulti-Valued Field Values 🔋 🗌
Business Area * Any *	→ Last Changed By		Days Since Last Updated	
Keywords		🗆 🖌	Days Since Created	
Search Attac		•	Originator	
Category * Any *	✓ Status (* A		_	
Product * Any *	Customer Name * A	ny * 🗸 🗸	Assigned To	L

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			
<ul> <li>Quicklist Report ?</li> <li>Detailed Report</li> </ul>		<ul> <li>Condensed Query Filters</li> <li>Expanded Query Filters</li> </ul>	○ Standard Query Screen ? ● Advanced Query Screen
Output ?	Browser	~	
	20 rows per page 🗸 🗸		
Saved Filters ?	* Saved filter list * V	Ipdate Filters	
Query Filters			Filter Multi-Valued Field Values ? □ Use Allowed Values in Filters ? ☑
Sel	ect Field	Operator	Value
Bu Bu	isiness Area(AREA)	📕 🖂 equals 🗸	Customer Issues
and V La	st Modified(TIMESTAMP)	✓ during	$\sim$ Last 4 weeks $\sim$

Advanced filter selection

To add a new filter, use the  $\frac{1}{2}$  button. Note that you can add filters following any existing filter. If you want to delete an individual filter from a query, use the  $\frac{1}{2}$  button. 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 Greater than Less than Not equal Less than or equal to Greater than or equal to Empty Not empty	Equals Greater than Less than Not equal Less than or equal to Greater than or equal to Empty Not empty
Checkbox, List, Pop-up, Tab, User	Equals Not equal	Equals In Not equal Not In
Date, Day	Equals Greater than Less than Not equal Less than or equal to Greater than or equal to Between Empty Not empty During After Before After or during Before or during	Equals Greater than Less than Not equal Less than or equal to Greater than or equal to Between Empty Not empty During After Before After or during Before or during
Keyword	Contains	Contains

Text Field

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

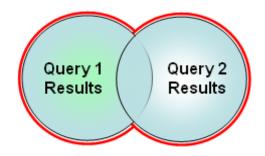
The operator values are largely self-explanatory, but a word of explanation is needed about the Empty and Not Empty values. When a numeric field (currency, decimal or number display types) is stored in ExtraView, and you do not enter a value, zero is not the value stored. A null, or empty value is stored 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 operator 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**

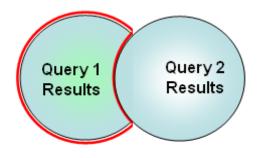
The following conjunctions can be used between the different filters of a report:

Conjunction	Meaning
and	This filter will ensure that both filter conditions on each side of the <b>and</b> 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 <b>or</b> is true
union	This will take the results of all the filters together preceding the conjunction <b>union</b> , together with the results of the filters in the query following the conjunction, and merge the results of both queries. For example, if you <b>union</b> 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 <b>union</b> conjunction.



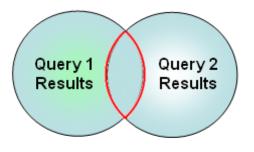
This will take the results of the query filter(s) before the conjunction **minus**, and remove all results in common with the results of the query filter(s) following the conjunction. For example, if the query before the **minus** returns 100 rows, and the query following the minus returns 60 rows, 30 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 **iintersect** 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 " <b>or</b> " as the last filter	The condition in the filter with the " <b>or</b> " 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 " <b>or</b> " 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	popup calendar. Dependin potentially time) into none <i>than, Less than, Not equal</i> you only enter a date into	hese operators, two date input fields appear, ng on the operator you select, you will enter e, one or the two fields. When you select Eq <i>f</i> , Less than or equal to, or Greater than or e the first field. When you select Between, yo or Not empty, then you do not enter any dat	a date (and <i>uals, Greater</i> <i>qual to</i> then w enter two
During After Before After or during Before or during	time expressions which co meanings is as follows. T	hese operators, you are presented with a num implete the filter. The list of valid expression his table assumes that today's date is Sunday ear setting of your installation starts on Janu	ns and their , February
	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
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_DATE	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 -

I

		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.

	= Helpdesk AND   I Smith on 03/25/2	Project = Helpdesk Dat	a AND Status = Ope	n			
	ID # ▼	Business Area	Title =			Application =	
	Priority .	Project =	Status •	Request Date •	Due by =	Assigned To =	
View E	dit 10530	Helpdesk	New chair for the			Microsoft Outlook	
Hist Q	dit P2	Helpdesk Data	Open	07/13/2007		Chris Robinson	
View E	dit 10527	Helpdesk	Authorization to p	ovide new furniture for new employ	ee - Frank Bell		
Hist Q	dit P 3	Helpdesk Data	Open	04/19/2007		Jimmy Duncan	
View E	dit 10518	Helpdesk	Authorization to p	ovide new furniture for new employ	ee - Gloria Menendez		
Hist Q	dit P3	Helpdesk Data	Open	04/13/2007		Jimmy Duncan	
View E	dit 10517	Helpdesk	Authorization to p	ovide a new telephone extension fo	or new employee - Gloria Men	endez	
Hist Q	dit P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
View E	dit 10516	Helpdesk	Authorization to p	ovide a new computer for new emp	loyee - Gloria Menendez		
Hist Q	dit P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
Count: 5 recor	ds						

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**.

ер			pdesk AND P in on 03/25/20	rolect – Heipdesk Data )14	AND Status = Open				
] (	lick her	e to che		all the records on this					
			ID#▼	Business Area =	Title =			Application =	
_			Priority =	Project •	Status = New chair for the offic	Request Date =	Due by •	Assigned To = Microsoft Outlook	
	View	Edit	10530	Helpdesk		5			
	Hist	Qedit	P 2	Helpdesk Data	Open	07/13/2007		Chris Robinson	
<b>~</b> )	View	Edit	10527	Helpdesk	Authorization to provid	de new furniture for new employ	yee - Frank Bell		
	Hist	Qedit	P 3	Helpdesk Data	Open	04/19/2007		Jimmy Duncan	
<b>V</b>	View	Edit	10518	Helpdesk	Authorization to provid	de new furniture for new employ	yee - Gloria Menendez		
	Hist	Qedit	P 3	Helpdesk Data	Open	04/13/2007		Jimmy Duncan	
	View	Edit	10517	Helpdesk	Authorization to provid	de a new telephone extension f	or new employee - Gloria Menende	ЭZ	
_	Hist	Qedit	P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
	View	Edit	10516	Helpdesk	Authorization to provid	de a new computer for new em	ployee - Gloria Menendez		
	Hist	Qedit	P 3	Helpdesk Data	Open	04/13/2007		Mary Brown	
Сог	int: 5 re	cords							
				k all the records on this					

Quicklist record selector

## **Exporting Results**

Refresh Turn O	n Record Selector	Group Issues	Update Issues	Return Expor	t Results Print Page		ExtraView Quicklist Report
Records 1 to 7 of 7	,				Microsoft Excel (Plai	n output)	
Status = Open AN	D Assigned To	= Bill Smith			Microsoft Word		
Prepared by Bill S					Microsoft Excel (For	matted output)	
			and the second s		Adobe PDF		
	ID # 🔻	Area =	Title •	l	Text		Days Open ■
	Priority =	Customer =	Status =	Produ	ct =	Module =	Assigned To =
View Edit	10557	Buos	There is a defe	ct in the admin r	module when a user q	nakes an error	755

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

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.

		ID # 🔻	Area 🗉	Title =			Days Open 🗉
		Priority =	Customer =	Status =	Product =	Module =	Assigned To 💷
View	Edit	10540	Test Cases	This is a test case for the length of the screen			553
Hist	Qedit			Not Yet Tested	Tracker	CLI	
		ID #	Area	Title			Days Open
		10539	Bugs	This is a fault with the Processor 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 connecti	on works correctly		1443
Hist	Qedit			Tested - Failed	Tracker	CLI	
View	Edit	10536	Test Cases	Check how many commands	are in the stack	and a state of the state of the	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.

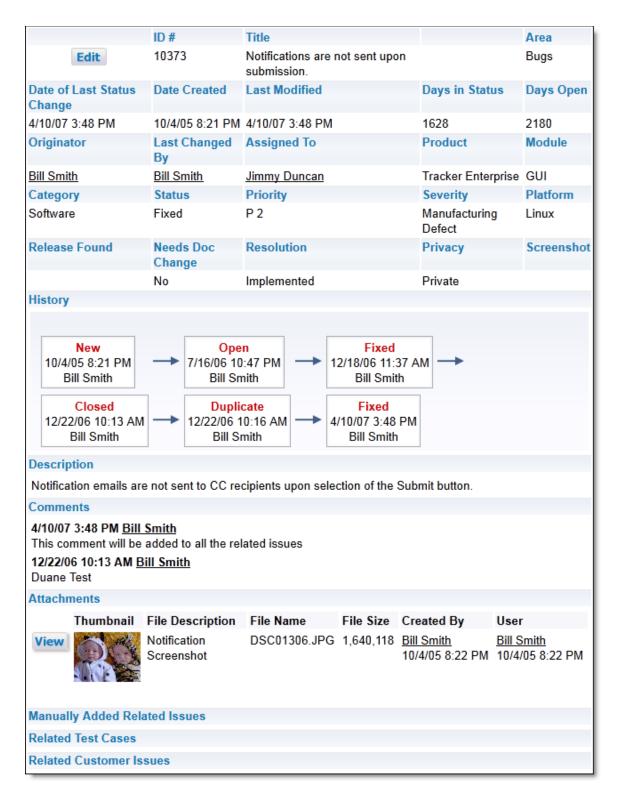
### **Hover Text Popups**

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:

isplaving reci	ords 21 to 40 of 1	58 >>				
isplaying ree	0103 21 10 40 01 1					
red by Bill S	mith on Octobe	er 13, 2015 11:08:52 AM	PDT			
ess Area eq	uals Bugs					
	ID # 🔻	Business Area	Title =			Days Open •
	Priority =	Customer Name	Status =	Product =	Module =	Assigned To
iew Edit	10621	Bugs	Software issue repor	ted by Customer		1259
list Qedi	tP4		New	Tracker Enterprise	GUI	太郎日本
'iew 📕 Edit	10620	Bugs	Software issue repor	ted by Customer		799
list Deta	ils			×	API	Bill Smith
iew						1263
ID # 10620 Hist Description Reproduction steps:					GUI	Mary Brown
iew	1. Login with valid Userld and Password					2369
list	2. Click	on [Workspace] from m	Processor	Sally Hunt		
iew	3. Enter multiple valid id (Ex: 10676;10677) in search for ID# and click on <enter> from keyboard</enter>					2616
list	4.Obse	erve 'ExtraView Detailed	Database	Bill Smith		
iew	Expect	ed Result:		3	2617	
list		error should not be obse	CLI	Jimmy Duncan		
iew	Actual	Result		2617		
list	Script error is observed					George Miller
iew	Ploase	view attached screen fo	r more information			2617
list <u>equa</u>	i lease	view attached screen to			CLI	George Miller
iew Edit	10548	Bugs	Test customer issue			2617
list Qedi	t P3	Cisco	New	Tracker	Processor	Mary Brown
iew Edit	10546	Bugs	This is a test case fo	r the length of the screen - Test Case Failure		1757
	tP4		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.



#### 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:

Keywords	
Search Attachments? 🗖	
- and the constraint of the co	for the second

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.

**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.

### **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 **abcxdef** but NOT **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 = strin ままま, which consists of five words (Alphanumeric and Hiragana). Another example is Fredキ ++, which gets broken into Fred +++, 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.

#### **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.

#### **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**



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.

Run Report Clear All Print Page		ExtraView Query
Query Options		
Quicklist Report	C Condensed Query Filters	Standard Query Screen
C Detailed Report	<ul> <li>Expanded Query Filters</li> </ul>	C Advanced Query Screen
Output Options		
Output to Browser	20 rows per page	
Query Filters		* Saved Filter List * Save / Update Filters ?
Business Any Bugs Area Bugs Test Cases Helpdesk Assets	Status * Any * * * None * New Not Yet Tested Tested - Passed ~	Days Since Last
Keywords Search Attachments?	SCM Job	Days Since Created
Product * Any * * * None * Tracker Tracker Enterprise Tracker Lite *	Priority * Any * Category * Any * None * P 1 = P 2 = P 3 * Category * Any * None * Docume P 2 = P 3 * P 1 = P 3 * P 1 = P 3 * P 1 =	entation * Current User Name * Bill Smith
Module * Any * * None * API CLI Database (Tracker)	Release * Any * Customer * Any * Release * None * 1.0 1.1 1.2	America
Run Report Clear All Print Page		

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.

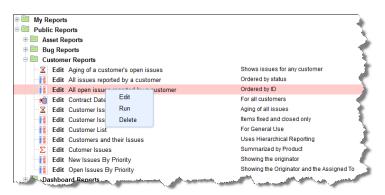
Print Page				ExtraView Report ?
Create New Report				
New column report	🗮 New planni	na report	B New contain	er for existing reports
Σ New summary report	🔀 New chart			or existing reports
New matrix report	B New taskb	and rapart		or existing reports
New aging report	T New dashb			
9 New calendar report	New custo	m URL report		
Output Options				
Output to saved format	0 rows per page	•		
Saved Reports 🙀	Manage	e User Groups Mai	nage Scheduled Reports	Manage Report Folders
Title		4	Description	
* Search *		* Search *		
🗉 🧮 My Reports				
Public Reports				
Asset Reports				
Bug Reports				
Customer Reports		0		
Edit Aging of a customer's open iss			s for any customer	
Edit All issues reported by a custom		Ordered by st Ordered by ID		
Edit All open issues reported by a c Bill Contract Date Renewals	ustomer	For all custon		
Edit Contract Date Renewals     Edit Customer Issues		Aging of all is:		
Edit Customer Issues - Time Spent			nd closed only	
Edit Customer List		For General U	Jse	
Edit Customers and their Issues		Uses Hierard	hical Reporting	
Edit Cutomer Issues		Summarized	by Product	
Edit New Issues By Priority		Showing the o	originator	
Edit Open Issues By Priority		Showing the (	Originator and the Assigned To	
Dashboard Reports				
Feature Request Reports				
🗈 💻 General Reports				
Helpdesk Reports				
Knowledge Base Reports				
B SLA Reports				
🖲 🔲 Test 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 here
- 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
- The **Shared Reports** area, where you place reports that you want to share with a report group. A report group is an arbitrary group of users and only members of the group can see and run reports shared within their group. Either you or another user may have created a shared report. The user's name who created the shared report is appended to the report title.

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 personal use, you can share the report with individual users who are members of a User Group. User Groups are created and maintained on the **Report** screen.

If you save the report as a public report, you can make it truly public, with all users having access to the report, but you can also share the report with one or more user roles. To allow multiple user roles to view the report, use the CTRL key and the mouse to select each of the roles who are to be given permission to view 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.

lders, you may also share the report with a	on. If you select saving the report within your In existing User Group. If you select saving t roles, or select any combination of roles who	he report within a
	icking on any existing folder, then enter a ne	
Report Title	Report of bugs by Category	
Report Description	Counting new, open and fixed bugs only	
Existing Folders	My Reports	
	Folder with PDF Reports Top Level Folder Second level folder Public Reports Bug Reports Knowledge Base Reports Customer Issue Reports Helpdesk Reports Feature Request Reports General Reports Test Plan Reports Dashboard Reports SLA Reports	E
Create New Subfolder Within: 'My Reports'		
Share report with User Group	* Do Not Share Report * CTI Delta Project Group Management Group	

Saving a report

- A user cannot save more than one report with the same title that is for personal use, and a report cannot be saved for global use, if a report with this title 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

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

Print Page		ExtraView Report
Create New Report		
II New column report	9 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		
Output to saved format	▼ 100 rows per page	
Saved Reports		Manage User Groups Manage Scheduled Reports Manage Report Folders
⊕ ♦ My Reports □ 10 Public Reports □ 2 Edit Feature	Reques <u>ts</u> - Open Requests By P	Product and Category
and and a Beneral second	A PARA A A A A A A A A A A A A A A A A A	and the and the survey of the

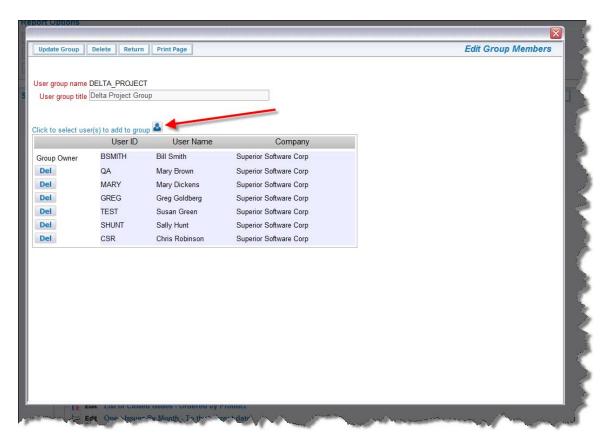
Managing user groups from the Report screen

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.

his utilit	ons y allows you purposes su	u to create and maintain gro ich as sharing reports.	ups of users. Groups of users an	e arbitrary collections of peop	ble that are primarily	
lew C	Create <mark>a new</mark>	v user group				
		Group Name	Group Title	Owner	Created	Last updated
Edit	Del	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	Del	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 Page				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.



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.

Applic folder, you may make it visible to all roles, or select any combination of roles who sloport. You can create a new subfolder by clicking on any existing folder, then enter a new formation of the second state of the s	
Report Description Counting new, open and fixed bugs only	
Existing Folders Folder with PDF Reports Top Level Folder Second level folder Public Reports Bug Reports Knowledge Base Reports Customer Issue Reports Helpdesk Reports Feature Request Reports General Reports Test Plan Reports Dashboard Reports SLA Reports	
reate New Subfolder Within: 'My Reports'	
Share report with User Group * <u>Do Not Share Report *</u> CTI Delta Project Group Management Group	

Editing 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 Cancel Print Page	Schedule a Report 김
Set schedule for report titled: Report of bugs by Category	
SCHEDULE DOCUMENT REPOSITORY EMAIL OUTPUT	
Schedule Options	
Schedule Enabled           Image: Schedule Enabled	
Frequency 🛛 Weekly	
Start no sooner than <b>?</b> Monday 🗸	
P Midnight	
Run as Owner 👔 🗹	
Select the Owner's Role 2 Administrator	
Output format PDF V	
Suppress recipient list 💡 🗆	
Suppress column reports <b>?</b> uith less than <b>o</b> 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 <b>Run as Owner</b> 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.
	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

Select the Owner's Role	owner at the time the report is run - this is the choice * <b>Owner's Current Role</b> *. For example an <i>Administrator</i> 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.

Set Report	t Schedul	e Run Now Cancel Print Pag	e	Schedule a Report ?
SCHED	ULE	OCUMENT REPOSITORY	EMAIL OUTPUT	
Send	Report	Output to Document Rep	ository	
Send to	o Reposito	ry⊖No⊖Yes		
Send to	o folder	My Personal Repository		Select a Different Folder

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 rightclick 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.

olders by right-clicking on the folder and	ou can create a new folder by right-clicking on the fold I selecting the appropriate option.		o contain the new loider	and you may rename or delet
Autosian columns				
Title	Folder		Sort Sequence	
• Search •	* Filter Folder *	~	* Search *	
My Repository     Public Repository Documents     Public Reports     1:2015 Documents     0:2016 Documents     0:2016 Documents     0:2016 Documents     Second Quarter Reports     Second Quarter Reports	First Quarter Reports First Quarter Reports/01-2016 Documents First Quarter Reports/02-2016 Documents First Quarter Reports/03-2016 Documents Second Quarter Reports			
Southern Division Folder	Southern Division Folder Southern Division Folder/ABC Product Southern Division Folder/XYZ Product			

Selecting a document repository folder

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.

et Report Schedule	e Run Now Cancel Print Pa	ge		Schedule a Rep	oort ?
SCHEDULE D	OCUMENT REPOSITORY	EMAIL OUTPUT			
Select Report F	Recipients, Email Subje	ct and Body			
	ct and add users to schedule				
User ID	User Name	First name	Last name	Company	
Select all users in a	role to add to schedule * No	ne *			
Subject Line					
Assigned To by Sta	itus				
Email Body					
Source 🝙	X 6 8 8 4 4	A Styles → Format	Font     Size	• · <u>A</u> · <u>A</u> · <u>X</u>	
BIUS	×₂ ײ   <u>I</u> x ] ]≣ :≣   :	표 99 맹 는 크 크		0 Ω 🗊 🗄 🖩	

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.

Hide Filters									
ilter List									
attern, including wil	dcards (*). The Ex				the results cu	a list of the items which beg irrently displayed on the sc		you may enter a s	search
Select filter column	for report				Owner	~			
or click on a letter					B   <all></all>	<pre><none></none></pre>			
or enter a search e	xpression and clic	k the Go but	ton		Enter searc	h expression	Go Export		
Owner	Running as	Enabled	Title	ID	Frequency	Last Scheduled Run	Next Scheduled Run	Date Created	Message
dit Delete <mark>Bill Sm</mark> i	th Administrator	No	My Open Issues	79	Weekly		Unscheduled	Jan 14, 2013	New
dit Delete <mark>Bill Sm</mark> i	th Development Engineer	Yes	Assigned To by Status	643	Monthly on Day	Apr 13, 2016 8:29:06 AM	May 2, 2016 12:00:00 AM	Feb 27, 2016	Pending : SUCCESS

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**

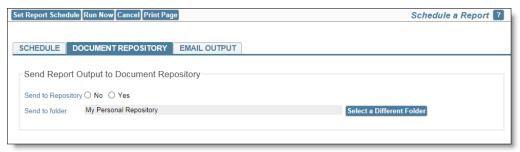
The document repository is accessed via the **Reports** screen. Users may send documents to the repository from the report scheduler, either on an immediate basis, or on a timed basis according to the schedule they create for the report. The user may store documents in a personal repository or within 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.



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. You can folders by right-clicking on the folder and select	n create a new folder by right-clicking on the fo cting the appropriate option.	lder to contain the new folder a	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 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 Document	ts	
Southern Division Folder	Southern Division Folder		
ABC Product	Southern Division Folder/ABC Product		
XYZ Product	Southern Division Folder/XYZ Product		
<ul> <li>02-2016 Documents</li> <li>03-2016 Documents</li> <li>Second Quarter Reports</li> <li>04-2016 Documents</li> <li>Southern Division Folder</li> <li>ABC Product</li> </ul>	First Quarter Reports/02-2016 Documents First Quarter Reports/03-2016 Documents Second Quarter Reports Second Quarter Reports/04-2016 Documen Southern Division Folder Southern Division Folder/ABC Product	ts	

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.

### 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
ψψμπιψψ	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 plann	ing report	New custom URL report			
Σ New summary report	😕 New chart		B New container for existing	reports		
New matrix report	🚟 New taskt	oard report	New layout for existing rep	orts		
New aging report	Te New treeg	rid report				
9 New calendar report	T New dashi	board report				
Output Options						
Output to saved format	S00 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					M	anage Repository Folders
🗘 🔸 — Autosize column						
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 las	st week showing the Originator and Re	equestor a Mar 6, 2016		
B Southern Division Folder						
# 🗐 First Quarter Reports						

The Document Repository on the Reports Screen

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:

ocument	Repository					Manage Repository Fol
	- Autostze colemns Delete Selected Documents					
Select	Title	Folder	Description	Date Created	Document ID	
Filter * 👳	* Search *	* Filter Folder *	Search *		* Search *	
	My Documents					
E	Report of Open issues		By Bill	Mar 6, 2016	5	
	memory Monthly reports for 04-2016	Monthly reports for 04-2016				
	= Dublic Documents					
	Open Issues Not Addressed		Issues from the last week showing the Originator and Requestor a	Mar 6, 2016	6	
	🕫 🚍 First Quarter Reports	First Quarter Reports	a 652 12			
	Second Quarter Reports	Second Quarter Reports				
11	🕫 🔤 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.

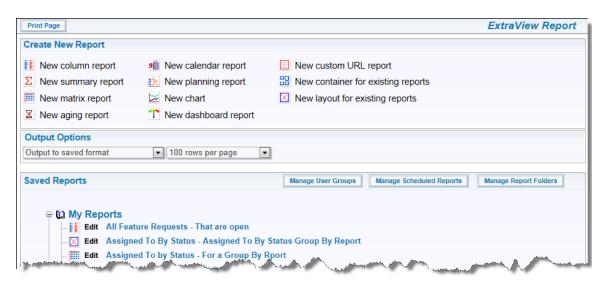
Note that when a report is shared with other users, whether it be a Public report, a report shared with users in role or a report shared with specific users, there is no guarantee that users who view the report will be able to see all the fields or all the issues within the report. There may be field-level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

Print Page		ExtraView Repor
Create New Report		
🖡 New column report	New calendar report	New custom URL report
Σ New summary report	New planning report	B New container for existing reports
	∠ New chart	New layout for existing reports
	New dashboard report	
a new aging report	I New dashboard report	
Output Options		
Output to saved format	<ul> <li>100 rows per page</li> </ul>	]
Saved Reports		Manage User Groups Manage Scheduled Reports Manage Report Folders
P-10 My Reports		
Edit All Feature F	Requests - That are open	
Edit Assigned To	By Status - Assigned To By	Status Group By Report
Edit Assigned To	b by Status - For a Group By R	lport
_ Edit Breakdown o	of Customer Issues - Custom	Pie Chart
Edit Breakdown o	of Statuses for Customer Issu	ies - Custom Bar Chart
Edit Bugs   Fixed	l in January - Bugs not Closed	d Yet
<b>Edit</b> Grouping Sta	atuses on a PDF Report - How	v a PDF Report is Generated
Edit My Hot List	- Priority 1 issues that are not	closed
Edit Owners of o	pen bugs - Sorted by owner	
Edit Report of Op	pen issues - By Bill	
—∑ Edit Report of bu	igs by Category - Counting ne	w, open and fixed bugs only
🖃 🕼 Folder with all rep	ports that prepare PDF's	
– 🔀 Edit Grouping	g of Status Reports - Used as i	input to a PDF container report
	g of bugs by Category - For a F	PDF
_∑ Edit Issues by	y Business Area - No filters	
_ 🔀 Edit Open iss	ues - For PDF output	
- 🔀 Edit Summary	y chart - For inclusion on cont	ainer
	y of Closed Customer Issues -	
	y of Fixed Customer Issues - E	
	y of Open Customer Issues - E	3y Product
Delta Public Reports		
	uests - Open Requests By Pro	oduct and Category
🕂 🛍 Bug Reports		

**Report Folders** 

## **Creating New Reports & Output Options**



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.

esh	Turn On Record Selector	Group Issues Mass Update Issues	Return Export	Results Filters Print Page	]	ExtraView Quicklist Repo
rds 1	to 100 of 1,484 🕨					
ovide	e values for the following	filter(s) for the report				
		22000		10.040		
		Field	Operator	Value		
		Area	=	Engineering Issues 💌		
	AND	Product	( <del>-</del>	ExtraView	•	
	AND	Committed Release		7.0 💌		
	Issues		7.0	Fixed	40	
		NATION Berndat	werend pood			Carl Koprah

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 *	▲ (三) ▼
ŧ≡ and 💌	Status(STATUS)	equals	•	Open Fixed Closed Duplicate Not Found	•      •
+ = or 💌	Customer(CUST_LIST)	equals	•	STH Computers Super Corp Trapeze Networks Westminster * Choose the Customer *	
t≡ and ▼	Status(STATUS)	equals	•	Fixed Closed Duplicate Not Found * Choose the Customer *	•
t = or 💌	Customer(CUST_LIST)	equals	•	STH Computers Super Corp Trapeze Networks Westminster * Choose the Customer *	
ŧ≡ and ▼	Status(STATUS)	equals	•	Fixed Closed Duplicate Not Found * Choose the Customer *	•

Setting up a complex query with runtime filters

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

Report Cancel Print	Page		Report that uses session variable
This report uses the valu values below that use th	ie(s) you select for the fo e filter field. This saves e	llowing field(s), and will ntering the same filter v	substitute the value(s) you select into all the runtime filter alue several times.
	Filter Field	Value t	o be used in substitution
	Choose the Customer	* Any * * None * Bank of Bear Inc Chrysler	America
Provide values for the fo	billowing filter(s) for the re	-	Value
	Field	Operator	
	Customer	=	* Any *  * None *  Bank of America Bear Inc. Chrysler
AND	Status	=	Open
OR	Customer	=	* Any * * None * Bank of America Bear Inc. Chrysler
AND	Status	=	Fixed
OR	Customer	=	* Any * * None * Bank of America Bear Inc. Chrysler
AND	Status	=	Duplicate
a D. a D.			
Report Cancel Print	Page		

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.

Refresh	Turn Or	n Record Selector	r Group Issues	Mass Updat	e Issues Ret	urn Export Results Filte	Print Page	ExtraView Qui	klist Report
Records 1	to 100 o	f 1,484   🕨					<b>N</b>		
rea = En	aineerin		Product = Extra	/iew AND Co	mmitted Relea	ise = 7.0			
		Coppel on 10/4				30 1.0	<b>\</b>		
	-,··								
		Issue # 🔻	Category =	Title =				Found in Release	Assigned To
		Area =	Module =	Status =	Priority =	Committed Release	Branch Status	Fixed-in build # •	Customer =
View	Edit	241721	Product Bug	User can er	ter invalid nam	nes for user groups		N/A	John Kienitz
Hist	QEdit	Engineering Issues	User Groups	Fixed	P 2	7.0	Fixed	40	
View	Edit	241703	Product Bug	QA-Worksp	ace-Report-Im	age icons not replaced wit	h different reports	7.0	Brent Thorington
Hist	QEdit	Engineering Issues	Workspace GUI	Open	P 3	7.0	Open		Kricon Solutio
View	Edit	241700	Product Bug	Uploading E	xcel template	s for merging data is broke	en	7.0	Carl Koppel
Hist	QEdit	Engineering	Search /	Can't Reproduce	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			TaskBoardReport				
Report		802					
Filter T		Expanded					
Query	Туре	Advanced					
SLA us	ed						
Report	ing Hierarchy used						
Transp	orted output(Y/N)	Ν					
Display	for mobile(Y/N)	Ν					
X Axis	fields	Status(STATUS	status(STATUS)				
Y Axis	fields	Assigned To(ASSIGNED_TO)					
Title fie	lds	ID #(ID) Title(SHORT_D	ESCR)				
Descrip	ation fields	Originator(ORIG Priority(PRIORI Product(PRODU Module(MODUL Severity(SEVER	TY) JCT_NAME) E) RITY_LEVEL) N(QUICKEDIT_BUTTON) T_BUTTON) W_BUTTON)				
Repor	t 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	le that are primarily	
sed for	purposes su	ch as sharing reports.				
ew C	Create a new	user group				
		Group Name	Group Title	Owner	Created	Last updated
Edit	Del	Group Name CTI	Group Title CTI	Owner Bill Smith	Created Bill Smith	Last updated Bill Smith
Edit	Del					
	Del			Bill Smith 10/5/11 8:05 AM Bill Smith	Bill Smith 10/5/11 8:05 AM Bill Smith	Bill Smith 10/5/11 8:06 AM Bill Smith
		СТІ	CTI	Bill Smith 10/5/11 8:05 AM	Bill Smith 10/5/11 8:05 AM	Bill Smith 10/5/11 8:06 AM
Edit Edit Edit		СТІ	CTI	Bill Smith 10/5/11 8:05 AM Bill Smith	Bill Smith 10/5/11 8:05 AM Bill Smith	Bill Smith 10/5/11 8:06 AM 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 y	rou run the report					
Browser	~		Use	SLA ? None *	~	
500 rows per page			Transpose rows			
Customers>Issues			Display on M Output Report Defin			
Drag or double-click fields to select, drag	fields to remove or change order	Drag or doub	le click up to 8 fields	to set sort order		
Find a field	Show field names	Find a field		Show field names		
2nd Fold title	<ul> <li>View Button</li> </ul>	Actual Renewal Date		_ ID #	N 1	
Abstract	Edit Button	Actual Time (hrs)		10		
Actual Renewal Date	0 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			7	2
Assigned To		Business Area		12		
Attachments	-	Case Status		-		
Display  Fields  Buttons  Expressions						
Query Filters O Standard Advanced	<ul> <li>Condensed Filters</li> <li>Expanded Filters</li> </ul>	* Saved filter list * Save / Update Filters	v 10		Filter ( Filter Multi-Valued	Child Values ?
Base level		Saver opuater men				10
Select Field	Ope	rator Value				
Business Area(AREA)		als v Customer Issues	୍			
	(iii) (**					
<b>V</b> Issues			and the second	clude parents without child	ren ? 🗌	
Find a field	Show field names	Select	Field			Operator Value
Date of Last Status Change	View Button     Edit Button	Busin	ess Area(AREA)		~	equals 🗸 Customer Issues 😿
Days Open Days Since Last Updated	D ID #	and V Custo	mer Name(CUST_LIS	T)	~	equals 🗸 * Ask at runtime * 😒
Days Since Last Opdated	© Status	and Casto	mer minie(0001_Cio	• /		
Description	Product					
Documentation	a Title					
Documentation Impact?	Description	- 9				
Due by		2				
Email Address						
Employee Department						
Employee Department						
Display • Fields OButtons OExpressions	the second s					
* Add a new Reporting Hierarchy to Base Level *	v)					
Run Report Save Report Save As Clear All						

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.

repared by E	Bill 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	Requirement reported to boost the output of the amplifier when in standby mode	Fixed	Bill Smith
Coca-Cola	Wilson	(232)323-2323	wilson@wwww.com	10488	Tracker	Software	Customer called looking for a new copy of documentation	Fixed	SCM Daemon
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10482	Tracker	Software	Process needed restarted before the screen would show the correct result	Fixed	Greg Goldberg
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10489	Tracker	Packaging	kjh	Fixed	George Miller
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10490	Tracker	Software	The counter needed resetting before the system would reboot	Fixed	Jimmy Duncan
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10491	Tracker	Documentation	Customer reports an issue with installation	Fixed	Jimmy Duncan
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	10496	Tracker	Software	Test customer issue	Fixed	George Miller
Evian	George Jones	(222)222-2222		10485	Tracker	Software	asdfgh	Fixed	Bill Smith
π	Suzuki	(232)323-2323	s@ntt.com	10472	Tracker Enterprise	Software	We have an NTT issue here	Fixed	Jimmy Duncan
Hewlett Packard	Chris Black	(232)323-2323		10473	Tracker Enterprise	Software	This issue identifies a problem with the widget when a customer tries to install it incorrectly	Fixed	Jimmy Duncan
Hewlett Packard	Chris Black	(232)323-2323		10474	Tracker Enterprise	Packaging	Problem with packaging	Fixed	Susan Green
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10469	Tracker	Documentation	This is an issue reported by Chrysler	Fixed	Chris Robinson
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10470		Documentation	When an issue is entered here, we should see it on a report	Fixed	Bill Smith
Chrysler	Olivia Peterson	(234)567-4566	op@chrysler.com	10471		Documentation	This is another issue entered on behalf of Chrysler, but this one has a longer title than the last one to see what happens when we 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	kijng	Fixed	Greg Goldberg

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.



#### 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 Issue	S	Refresh Group	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						
Customer	Customer Contact	Phone Number	Customer Email	Cnt			
Coca-Cola	Wilson	(232)323-2323	wilson@wwww.com	2			
Cisco	Fred Chiarini	(408)290-4568	fchiarini@cisco.com	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			
Uniyara	Owna Peterson	(204)001-4000	opgon yat.com	•			
						Reco	rds 1 to 6 of
			Refresh Group	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 subfolders.

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:

delete an existing f	and its optional sort sequence, click on the Edit button by the folder name in the folder tree. Use the D folder. Folders may only be deleted if they are empty. To create a new report folder, click on the folder the folder to the folder the folder to the folder the folder the folder to the folder the folder to the folder	
	ew folder name and an optional sort sequence.	
	er under: My Reports	
Folder name		
Sort sequence		
	Create new folder	
older Tree		
01401 1100		
My Report Edit	orts Folder with all reports that prepare PDF's	
- Public R		
- Edit	Bug Reports	
	Knowledge Base Reports	
	Customer Issue Reports it Customer issues sub folder	
	Edit Customer issues sub-sub folder	
Edit	Helpdesk Reports	
Edit	Delete Feature Request Reports	
	General Reports Test Plan Reports	
	Dashboard Reports	
- Edit		
— Edit — Edit	SLA Reports	
— Edit — Edit	SLA Reports	
— Edit — Edit	SLA Reports	

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.

## **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:

Run Report Save Report Save	As Schedule Report Delete Report Cl	ear All Cancel Print Page			ExtraView Column Report ?
Report title         Customer List           Description         For General Use	× ?	Title & Descripti	on		
Browser 500 rows per page V * Select Reporting Hierarchy * V	]	rt Options Outp	Use SLA ? ranspose rows/cols ? Display on Mobile ? ut Report Definition ?		<b>v</b>
Find a field	o select, drag fields to remove or chang	ge order Find a fiel		up to 8 fields to set so	rt order w field names
2nd Fold title Abstract Actual Renewal Date Actual Time (hrs) Address Approved by Asset Type Asset details Assigned To Attachments Display © Fields OButtons (	Customer Name Phone Number	Actual Re Actual Tim Application Approved Assigned Automate Building Bus Prior Business Case Stat	n by a Available fo for Sort C l ty ty	ID #	tomer Na@elected Fields for Sort Order Asc. or Desc Sort Group Headings
Query Filters O Stand Adva		* Saved filter list * Save / Update Filters	-		Filter Child Values 👔 🗌 Valued Field Values 👔 🗌
Select Field	218F13		rator Value		
and V Project(PRC		~)[eq	uals V Customer	s V	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:

<b>Delete Button</b>	This allows the deletion of the issue
Edit Button	This button allows you to edit the issue
<b>History Button</b>	Clicking this button displays the history of the issue
Quickedit Button	This allows you to use Quickedit mode within the report
View Button	Displays 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	Fir
Abstract	(Record Selector)	Aç
Actual Renewal Date	View Button	AL
Actual Time (hrs)	Edit Button	Ad
Address	Quickedit Button	Ap
Application	ID #	As
Approved by	Priority	As
Asset Type	Product	Au
Asset details	Module	Bu
Assigned To	Status	Bú
Attachments	🗸 🗖 Title	Bu
Automated 🛛 🖌		C
Display   Fields   Buttons   Exc	pressions	

- 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 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 fix the width of the column, measured in characters. 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. 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.

#### 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.

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	g n	· · · · · · · · · · · · · · · · · · ·
Approved by	Report output option	ns for this field
Asset Type	•	
Asset details	Alternate Field Title	
Assigned To		
Attachments		
Automated	Field Width	
Display  Fields  OButtons  OExpress	ssions	
Query Filters O Standard	O Condensed Filters	
Guery rinters Standard	Condensed Filters	* Saved filter list * V

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		Show field names	Find a field	
Expression - Curren	ncy	View Button	Actual Renewal Date	
		Edit Button	Actual Time (hrs)	
Expression - Day		D #	Application	
Expression - Decin	nal	Last Modified	Approved by	
Expression - Numb	er	Product	Asset Type	
Expression - Text F	ield	F.C Mumber	Assisted To	
		Alternate Field Title		
Display OFields	OButtons  Express	sions Field Width		
Display OFields Query Filters	OButtons   Express  Standard  Advanced	ions Field Width C C C Calculated Expression	=	lulti-Valı
	O Standard			lulti-Val

Selecting options on a field that allows calculated expressions

Find a field		□ Show field names	Find a field
Expression - Current	CV	View Button	Actual Renewal Date
Expression - Date		Edit Button	Actual Time (hrs)
Expression - Day		PID #	Application
Expression - Decima	ıl	Report output options for th	is field
Expression - Numbe	r		
Expression - Text Field		Alternate Field Title	
		Field Width	
Display OFields	OButtons	ns Add drilldown - use when field	contains "ID #' values only
Query Filters	O Standard Advanced	No Drilldown     Expanded Filters	r Mul

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.

			= Customer Issue 12/11/11 9:04 AN		
		ID # =	Originator	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 difficulty completing installation
View	Edit	10340	Bill Smith	Mary Brown	Customer reports a problem with the widget
View	Edit	10300	Bill Smith	Greg Goldberg	Customer needs help
View	Edit	10293	Bill Smith	Bill Smith	Customer reports a missing item in the most recent delivery
View	Edit	10285	Bill Smith	Bill Smith	Customer called to say he did not receive the spare part sent on $4/3/05$
View	Edit	10353	John Customer	Bill Smith	Need to know how exclusive or's are processed internally
Count:	7 reco	rds			

### **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.

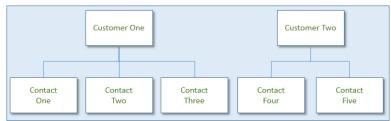
								Records 1 to 20 of 120	
siness	Area =	Bugs							
pared	by Bill S	Smith on March 6, 20	007						
tego	ry: Doc	umentation							
		Assigned To	Business Area	= 1D #	# Module	Product	Status	= Title	
ew	Edit	Mary Brown	Bugs	10326		Tracker	New	update times right away!	
iew	Edit	Sally Hunt	Bugs	10191	GUI	Tracker Enterprise	Fixed	A single swalow does not a spring make	
ew	Edit	Bill Smith	Bugs	10165	GUI	Tracker Enterprise	Fixed	There is a program exception in the reports module, when running the report named "List all Customer Issues"	
ew	Edit	Bill Smith	Bugs	10102		Tracker	Fixed	Turn left at the next Exit	
ew	Edit	Jimmy Duncan	Bugs	10101		Tracker Lite	Not Found	A single swalow does not a spring make	
iew	Edit	Jimmy Duncan	Bugs	10086		Tracker	Not Found	Metal mounting bracket is too short	
iew	Edit	Susan Green	Bugs	10083		Tracker Enterprise	Fixed	Metal mounting bracket is too short	
ew	Edit	Jimmy Duncan	Bugs	10074		Tracker Enterprise	Closed	Save it to a file with a good name	
ew	Edit	Jimmy Duncan	Bugs	10072		Tracker	Not Found	Metal mounting bracket is too short	
iew	Edit	Jimmy Duncan	Bugs	10069		Tracker	Duplicate	A single swalow does not a spring make	
iew	Edit	Jimmy Duncan	Bugs	10065		Tracker Enterprise	Closed	Build it and they will come	
iew	Edit	Susan Green	Bugs	10061		Tracker Lite	Duplicate	A single swalow does not a spring make	
		Assigned To	Business Area		Module		Status		
ew		Bill Smith	Bugs	10334	Database	Tracker	Closed	Here is the scoop on the new equipment	
ew	Edit	Jimmy Duncan	Bugs	10284		Tracker	New	Failure 003454 recorded in stepper motor	
ew	Edit	Bill Smith	Bugs	10104		Tracker	Fixed	Metal mounting bracket is too short	
ew	Edit	Susan Green	Bugs	10089		Tracker	Closed	Metal mounting bracket is too short	
ew	Edit	Bill Smith	Bugs	10059		Tracker Lite	Fixed	Build it and they will come	
		Assigned To	Business Area	" ID #	# Module	Product	Status	= Title	
ew	Edit		Bugs	10233		Tracker	New	The box is loose	
iew	Edit		Bugs	10222	GUI	Tracker Lite	New	This issue is entered by a customer role user	
iew	Edit	Susan Green	Bugs	10206		Tracker Enterprise	Fixed	The box insert needs to be printed on different colored paper	
								Records 1 to 20 of 120	

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:

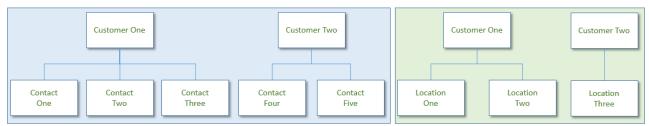


Logical Representation of Simple Parent-Child Hierarchy

Contacts	
Contact One	
Contact Two	
Contact Three	
Contact Four	
Contact Five	
	Contact One Contact Two Contact Three Contact Four

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	× ?					
and contraction of the second		Locali					
Description For G	eneral Use	Local	10				
Browser		~		Use SLA ?	* None *	~	
500 rows per page				e rows/cols 👔			
			Display	on Mobile 👔			
* Select Reporting	Hierarchy *		Output Repor	t Definition 👔			
Drag or double	-click fields to select,	drag fields to remove or chang	je order Drag o	r double click	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	Actual Renewal Da	ite	0	Customer Name	
Abstract		Edit Button	Actual Time (hrs)			ID #	<
Actual Renewal Da	te	D #	Application				
Actual Time (hrs)		Customer Name	Approved by				
Address		Phone Number		Asset Type			
Application			Assigned To				
Approved by			Automated				
Asset Type			Building		1		
Asset details			Bus. Priority Business Area				?
Assigned To Attachments		14	Case Status				
	OButtons OExpress	sions	Case Status		*		
Query Filters	○ Standard	Condensed Filters	* Saved filter list *	~		Filter Child Values ?	
	Advanced	O Expanded Filters	Save / Update Filters ?		Filter	Multi-Valued Field Values ?	
	Select Field		Operator	Value			
00	Business Area(AREA	)	✓] [equals	Customer	s ~		
and V	Project(PROJECT)		✓ equals	Customer	Information	~	

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					ExtraVI	ew Column Report 👔
Column Report Options							
Report title Customer Issues							
Description Provide the customer name when	you run the report						
Browser	~		Us	e SLA 🕐 * None *	×		
500 rows per page			Transpose row	s/cols 7			
500 lows per page			Display on M	Aobile 🔽 🗌			
Customers>Issues ~			Output Report Def	Inition 🛃 🗌			
Drag or double-click fields to select, drag	P. D. J.	Deser	or double click up to 8 fields	the standard sector			
and the complete states and the second states and the second states and the second states and the second states		and the second se	or double click up to a fields				
Find a field	Show field names	Find a field		Show field names			
2nd Fold title	View Button	Actual Renewal D		0 ID #	×	1	
Abstract	Edit Button	Actual Time (hrs)					
Actual Renewal Date Actual Time (hrs)	Customer Name	Application Approved by		-			
Address	Customer Contact	Asset Type		-		-	
Application	Contact Phone	Assigned To		-			
Approved by	Connect Priorie	Automated		-		-	
Asset Type	-	Building		-		-	
Asset details		Bus. Priority		-	2 2		
Assigned To		Business Area		-		1	
Attachments		Case Status		-			
Display  Fields  Buttons  Expressions				-010			
Query Filters O Standard	Condensed Filters	* Saved filter	list* v		Filter C Filter Multi-Valued F	hild Values ?	
Advanced	O Expanded Filters	Save / Upda	te Filters ?		Pritet manu-kaidea r	Heid Values 7	0
Base level					-		
Select Field	Ope	rator Value					
Business Area(AREA)	equ	als 😪 Custome	r Issues 🧹				
V Issues		Perform appregate	function on results 👔 🗆 I	nclude parents without chil	drem 🔽 🗌		
Find a field	Show field names		Select Field			Operator	Value
Date of Last Status Change	View Button	00	Business Area(AREA)		~	equals v	Customer Issues
Days Open	Edit Button	1000	Dualitiess Alea(ARCA)			ednara .	Gusiomer issues
Days Since Last Updated	a ID #	and V	Customer Name(CUST_LIS	5D	~	equals V	* Ask at runtime * 😒
Days in Status	Status	1					· · · · · · · · · · · · · · · · · · ·
Description	Product	1					
Documentation	C Title						
Documentation Impact?	Description						
Due by							
Email Address							
Employee Department							
Employee Name	v.						
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.

# **Transposing Rows/Columns**

#### <u>Add new comment</u>

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

	ExtraView Colu	mn Report 👝
Description		
A * None *		Transpose rows/cols

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 =	Р3	P 3	P 3	P 1	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	Group Issues	Mass Update Issues	Return Filters	Print Page		Ope	n Issue SLA
Records 1 t	o 2 of 2						Customer Issues
Area = Cus	stomer Issues	AND Status = Open A	AND Priority = P 1, P	2			
Prepared b	y Bill Smith on	3/3/12 9:25 PM					
	ID # ▼	Assigned To =	Date Created =	Customer =	Title =	P 1 Issues	P 2 Issues
View Ed	dit 10573	<u>George Miller</u>	3/3/12 12:00 AM		Customer reports an error in the report module	In 00:00:01	
View Ed	dit 10554	Greg Goldberg	12/19/08 12:00 AM	Info Technology	Here is a customer issue		Out 1144:04:41
Count: 2 r	ecords						
Records 1 t	o 2 of 2						
Refresh	Group 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.

Column Report	Options						
Report title Rank I	ssues for Release		2				
Description Enter F	Release Number at Runti	ime	Localize				
Browser		~		Use SLA 👔 • Nor	ne "	V	
	100			Transpose rows/cols 2			
500 rows per page	~			Display on Mobile 김 🗌			
* Select Reporting	Hierarchy * 🖂			Output Report Definition 🔋 🗆			
Drag or double	-click fields to select,	drag fields to remove or o	hange order	Drag or double click up to	o 8 fields to	set sort order	
Find a field		Show field name	s	Find a field	]	Show field names	
nd Fold title		^ DD#		Actual Renewal Date	^	Ranking	/
bstract		Ranking		Actual Time (hrs)		ID #	×
ctual Renewal Dat	e	Priority		Application			-
ctual Time (hrs)		Title		Approved by			
ddress		Status		Asset Type			
pplication		Module		Assigned To			
pproved by		Edit Button		Automated			
sset Type		Quickedit Button	8	Building			
sset details		View Button		Bus. Priority			?
ssigned To				Business Area			
ttachments		•		Case Status	¥		
Display   Fields	OButtons OExpress	sions					
Query Filters	O Standard Advanced	Condensed Filters     O Expanded Filters	* Saved fil		Filter	Filter Child Values ?	
		14	Save / Up	odate Filters ?			
	Select Field			Operator Value			
	Business Area(AREA)	)		equals V Bugs	~		
and 🗸	Requested Release(R	ELEASE_FOUND)		equals 💟 * Ask at runtime *	~		

#### Ranking Report Editor

Rank Re	port				Φ	8	
or all iss	ues within the re	elease		Y 🛎 🕈	Xisplaying rec	cords 1 to	151 of 15
D#=	Ranking 4	Priority .	Title =	Status • Module			
10053	1	P 4	Have wings will fly, that's what they say	Not Found	Edit	Qedit	View
10010	2	P4	How do I do this operation?	Closed	Edit	Qedit	View
10091	3	P 4	Build it and they will come	New	Edit	Qedit	View
10073	4	P 4	Turn left at the next Exit	Fixed	Edit	Qedit	View
10058	5	P 4	Turn left at the next Exit	New	Edit	Qedit	View
10084	6	P 2	A single swallow does not a spring make	New	Edit	Qedit	View
10068	7	P4	Have wings will fly, that's what they say	Closed	Edit	Qedit	View
10071	8	P 2	Have wings will fly, that's what they say	Fixed	Edit	Qedit	View
10088 10	060 13	P2 P4	Have wings will fly, that's what they say	Open Closed	Edit	Editdit	Sedis" N
10065	10	P1	Build it and they will come	Closed	Edit	Qedit	View
10059	11	P 2	Build it and they will come	Fixed	Edit	Qedit	View
10076	12	P 4	Save it to a file with a good name	Fixed	Edit	Qedit	View
10060	13	P 4	Have wings will fly, that's what they say	Closed	Edit	Qedit	View
10078	14	P 1	A single swalow does not a spring make	Closed	Edit	Qedit	View
10064	15	P 2	Turn left at the next Exit	Fixed Database	Edit	Qedit	View
10070	16	P 4	Build it and they will come	Closed	Edit	Qedit	View
10077	17	P 2	Metal mounting bracket is too short	New	Edit	Qedit	View
10057	18	P 1	Metal mounting bracket is too short	New	Edit	Qedit	View
10075	19	P 2	Turn left at the next Exit	New	Edit	Qedit	View
10063	20	P 4	Metal mounting bracket is too short	Fixed	Edit	Qedit	View
10062	21	P 2	Save it to a file with a good name	Not Found	Edit	Qedit	View
10074	22	P 4	Save it to a file with a good name	Closed	Edit	Qedit	View
10042	23	P 4	Have wings will fly, that's what they say	Fixed	Edit	Qedit	View
10067	24	P 2	Turn left at the next Exit	Fixed	Edit	Qedit	View
10066	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
10018	27	P4	Have wings will fly, that's what they say	Closed	Edit	Qedit	View
10072	28	P4	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**

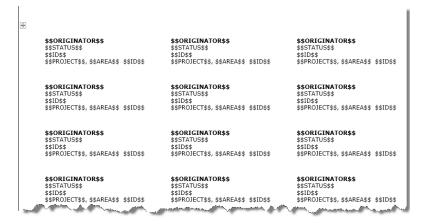
This feature is used to merge ExtraView data produced with a Column report, with a Microsoft Word template that contains mailing (or similar) data. The typical use for this report is to create a Microsoft Word document containing mailing labels, using data from ExtraView issues.

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

Envelopes and Labels	? <mark>×</mark>
Envelopes Labels	
<u>A</u> ddress:	📑 🔻 🔲 Use <u>r</u> eturn address
\$\$ORIGINATOR\$\$ \$\$STATU\$\$\$ \$\$ID\$\$ \$\$PROJECT\$\$, \$\$AREA\$\$ \$\$ID\$\$	
Print © Full page of the same label	Label Microsoft, 1/2 Letter
Siggle label Row: 1 & Column: 1 &	1/2 Letter Postcard
Before printing, insert labels in your printer's	
Print New Document	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:



• 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

Column Report Options	Save As Clear All Cancel Print Pag	e		ExtraView Column Report
			~	
Report title				
Description				
Microsoft Word mail label (Merge with uploaded file)		Output Report Definition 🛜 🗆	Merge data with	? Upload Template
			MS Word Template	t oproud template
500 rows per page				
Drag or double-click field	Is to select, drag fields to remove or cha	ange order Drag or d	double click up to 8 fields to	set sort order
Find a field	□ Show field names	Find a field	]	Show field names
2nd Fold title		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:

	🚽 🤊 - (°	-   <del>-</del>	ExtraViewReport_10	9351.xls [Com	patibility Mo	de] - Microso	ft Excel			X
Fi	ile Home	e Insert Pa	age Layout Formulas	s Data	Review	View Add	d-Ins		ء 🕜 د	- @ X
Pas Clipi	B		▼ = = = 部 A* ■ = = ■ 定律 ≫ * Alignment		• A	Hara Insert → Hara Delete → Hara Format → Cells	r	ort & Find & Iter * Select *		
	A1	<b>-</b> (0	<i>f</i> <sub>∗</sub> Originator			1				¥
1	А	В	С		D	E	F	G	H	1 =
1	Originator	Category	Product		IssueCount					
	Bill Smith	Software	Tracker		1					
3	Bill Smith	Documentation	Tracker Enterprise		1					
4	Bill Smith	Documentation			1					
5	Bill Smith	Software	Tracker		1					
6	Chris Robins	Software	Tracker Lite		1					
7	Chris Robins	Software	Tracker		1					
8	Chris Robins	Documentation	Tracker		1					
9	Chris Robins	Packaging	Tracker Enterprise		1					=
10	Chris Robins	Software	Tracker Lite		1					
11	Chris Robins	Software	Tracker		1					
12	Chris Robins	Software	Tracker Enterprise		1					
13	Chris Robins	Software	Tracker		1					
14	Chris Robins	Packaging	Tracker Lite		1					
	Chris Robins		Tracker		1					
16	Chris Robins	Software	Tracker		1					
17	Chris Robins	Software	Tracker Lite		1					
18	Chris Robins	Software	Tracker		1					
19	Chris Robins	Packaging	Tracker Lite		1					
20	Chris Robins	Software	Tracker		1					
21	Chris Robins	Documentation	Tracker		1					
22	Chris Robins	Packaging	Tracker Enterprise		1					
23	Chris Robins	Software	Tracker Lite		1					
24	Chris Robins	Documentation	Tracker		1					
25	Chris Robins	Packaging	Tracker		1					
	Chris Robins		Tracker Lite		1					
			Tracker Enterprise		1					
	Chris Robins		Tracker		1					
	Chris Robins		Tracker		1					
	Chris Robins	00	Tracker Lite		1					
	Chris Robins		Tracker		1					_
	Chris Dohing		Tracker Enternice		1					• I
Rea	idy							100% 🗩		- 🕂 ,;;

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:

		- Cl -	-	Extra	ViewRepo	rt_109351.xls [0	ompatib	ility Model	- Micro	soft Ex	cel	PivotTable Tools	X
	ile	Home			Page Layou		Data				dd-Ins	Options Design	
	iste oboard	→ B		- 1 <u>U</u> - A	10 v A A	≡ = = = = ≣ ≡ ≡ ≣ ≇ ≇ ≫·· Alignment	Gen	eral ▼ ▼ % ♥	Styles	P P	osert 👻 Delete 👻 Format 👻 Cells	∑ •	
	,	43		- (	$f_x$	Sum of Iss	ueCount	:					~
		А			В	С		D	E		-	PivotTable Field List	<b>▼</b> X
1	_			D	rop Repo	rt Filter Fields	Here						eport:
	Sum o	fleene(	Count	Catego								Choose fields to add to r	eport:
4	Origina			Softwa		Documentatio	n Pack	aging	Grand	Total		<b>V</b> Originator	
5	Bill Sn				2		2			4		Category	
6		Robinso			24		10	16		50		▼ IssueCount	
7	Grand	Dunca Total	n	<u> </u>	26		12	1 17		1 55			
9	Grand	Total			20		12			55			
10													
11	_												
12 13	-												
14													
15													
16	_												
17 18	-												
19												Drag fields between area	a halawa
20													Column Labels
21	_												Category T
22 23	-												go, ;
24													
25													
26												Row Labels	Σ Values
27 28												Originator 🔻	Sum of Issue 🔻
29													
30													
31											-	Defer Layout Update	Update
14	+ F FI	Pivot	Table	Sour	ce / 🐑	/	[ ◀				▶ [		
Rea	ady	-		-								<b>III III 100% —</b> —	
_													

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		_	
Description			
Microsoft Excel (Merge with uploaded file)	Output Report Definition 👔 🗆	Merge data with TUpload Excel File	Excel Sheet * None * 👻
500 rows per page		Place data A Row 1 Include Titles in	Column ? Use Template ? Sheet Format
* Select Reporting Hierarchy *			
Drag or double-click fields to select, drag fields to rem	nove or change order	Drag or double click up to 8 fields to	set sort order
Find a field Show fi	eld names 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.

# **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:

	e Report Save	No L CICCII M	Cancer	, mar ago		Ext	
Summary Repor	rt Options						
Report title Report	rt of Issues by Cat	egory					
None Vort	to Date						
Description Year	to Date						
Browser				s to Report 🔽 🗹 Total	Percent	🗆 Mean 🗆 Min 🗆 M	
		Inc		vith no Data <u>?</u> 🗆			Output Report Definition 🛐
* Select Reporting	g Hierarchy * 🗠		Aggregati	ion Method 김 🖲 Coun	t Issues () Su	im Issues	Wrap Titles on Output 💽
elect fields to s	summarize by d	ouble-click	ing. Drag th	he fields to remove	them from t	he list or change th	ne order.
Find a field			Show fie	eld names			
Actual Renewal Da	ate	^	Category	y			
Actual Time (hrs)							
anlighting							
pplication							
sset Type							
pproved by sset Type ssigned To							
pproved by sset Type ssigned To utomated							
pproved by sset Type ssigned To utomated uilding							
pproved by sset Type ssigned To utomated uilding us. Priority							
pproved by sset Type ssigned To automated uilding tus. Priority tusiness Area							
pproved by sset Type ssigned To automated uilding tus. Priority tusiness Area case Status							
pproved by ssset Type sssigned To uutomated luilding lus. Priority lusiness Area ase Status ategory							
Application Approved by Asset Type Assigned To Automated Building Bus. Priority Bus. Priority Business Area Case Status Category Cell Phone			Sort on <b>?</b>	* None *			
Approved by Asset Type Assigned To Automated Building Bus. Priority Dusiness Area Case Status Category	O Standard Advanced	©Condens OExpande	sed Filters	* None *	ers ?		Allowed Values in Filters <table-cell> 🗌 Aulti-Valued Field Values 🝞 🗌</table-cell>
pproved by ssset Type sssigned To uutomated building bus. Priority business Area case Status category cell Phone			sed Filters	* Saved filter list *			
Approved by Assigned To Assigned To Automated Building Bus. Priority Business Area Case Status Case Status Category Cell Phone	Advanced	OExpande	sed Filters	* Saved filter list *		Filter N	lulti-Valued Field Values <mark>?</mark> 🗆

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

Prepared by Bill Smith or				
Assigned To in Bill Smith	; Chris Robinson; I	Mary Brown and Bu	siness Are	a in Bugs; Test Case Management; Helpdesk
Business Area ≜	Category A	Assigned To A	Total =	
Bugs	Documentation	Bill Smith	2	
		Chris Robinson	6	
	Packaging	Bill Smith	4	
		Chris Robinson	1	
		Mary Brown	3	
	Software	Bill Smith	21	
		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

Prepared by Bill Smith or	1 April 25, 2016 10:	59:23 PM PD1				
ssigned To in Bill Smith	; Chris Robinson; M	Mary Brown and Bu	siness Area	a in Bugs; Tes	Case Manager	nent; Helpo
usiness Area 🔺	Category A	Assigned To A	Total =	Percent .	Mean	
lugs	Documentation	Bill Smith	2	2.50%		
		Chris Robinson	6	7.50%	24	
	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%	1	
	Sub-Total		14	17.50%	4.7	
lelpdesk	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 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 fix the width of the column, measured in characters. 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.

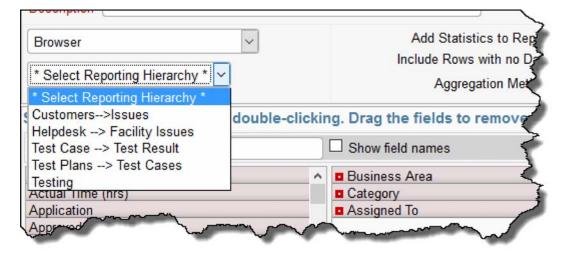
# **Displaying Only the Top Summarized Results**

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:



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 Clear All Cancel Print Page	ExtraView Summary Report ?
Summary Report Options	
Report title	
Description	
Browser Add Statistics to Report ? Total Include Rows with no Data ?	Percent Mean Min Max     Display on Mobile      Output Report Definition
Testing Aggregation Method ? O Coun	
Select fields to summarize by double-clicking. Drag the fields to remo	ve them from the list or change the order.
Find a field Show field names	
Actual Renewal Date Assigned To	
Actual Time (hrs) Report output options for t	this field
Application	
Approved by Display sub-totals	
Asset Type	
Assigned To Sort by (Sort direction)	
Automated Field values (Ascending)	V
Building	
Bus, Priority Business Area Alternate Field Title	
Dusiness Area	
Case Status	
Category V	
Hierarchy Level	
Perform count on 7 Test Plan> Test Case	×
Query Filters O Standard  Condensed Filters * Saved filter list *	Use Allowed Values in Filters ?
Advanced     Advanced     OExpanded Filters     Save / Update Fil	Filter Multi-Valued Field Values 👔 🗆
Base level	
Select Field	Operator Value
Project(PROJECT)	equals V Test Plans V
Test Plan> Test Case Include parents without children ?	
Select Field	Operator Value
Project(PROJECT)	equals V Test Cases
Test Case> Test Result Include parents without children ?	
Select Field	Operator Value
	· · · · · · · · · · · · · · · · · · ·
Run Report Save Report Save As Clear 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 right-clicking 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.

# **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			1	
Description		Line and a		
Browser	~		ics to Report 👔 🗹 Total 🛛 Percent 🗍 Mean 🗌 Min 🗌 Max	Display on Mobile 🛃 🗔
		Aggr	ation Method 👔 🖲 Count Issues 🔿 Sum Issues	Output Report Definition 7
* Select Reporting	Hierarchy *		Comparison 💽 * None *	Wrap Values on Output 👔 🗆
Select Fields to F	Form Matrix Report			
Fields Across Colum	ns (X axis) ?		Fields Down Rows (Y axis) ?	
Find a field		Show field names	Find a field	Show field names
Actual Renewal Date	0	^	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 Business Area			Bus. Priority Business Area	-
Case Status			Case Status	
Category			Category	-
Cell Phone		~	Cell Phone	~
Include columns with	no data 👔 🗆		Include rows with no data 💽 🗖	Sort on 👔 *None *
Query Filters	O Standard	Condensed Filters		e Allowed Values in Filters ? 🛛
	Advanced	O Expanded Filters	Filter	r Multi-Valued Field Values 👔 🗖
Select Field			Operator Value	
Select *				

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**.

тера	red by Bill Smith	on Aug 11, 2	2014								
Busine	ess Area = Custo	mer Issues									
						Assigned T	ō				
		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
t P	Packaging	1	5	3	1	5	2			3	2
g s	Software	7	10	4	5	7	3	2	1	4	43
, т	Total	11	21	8	10	18	6	2	1	9	86

Sample matrix report counting issues

									By Categ	ory and Assi	gned To
Pre	pared by Bill Smith	on Aug 11, 2	2014								
Bu	siness Area = Custo	mer Issues									
						Assigned	То				
		Bill Smith	Chris Robinson	George Miller	Greg Goldberg	Jimmy Duncan	Mary Brown	Mary Dickens	SCM Daemon	Susan Green	Tota
C a	Documentation	11	5	0	14	0	3	0	0	0	3
t e	Packaging	4	0	5	4	4	4	0	0	4	2
g o	Software	15	13	7.5	17	7	6	0	1	0	66.
r y	Total	30	18	12.5	35	11	13	0	1	4	124.
Su	m by: Actual Time (	(hrs)									
ofr	esh Return Filte	re Drint D	200								

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 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 fix the width of the column, measured in characters. 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 time-based 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.

	tistics to Report 2 🗹 Total 🗆 P regation Method 3 @ Count Issu Comparison 3 • None •		Display on Mobile 👔 🗆
Browser Add Sta	regation Method 👔 🖲 Count Issu		
Browser Add Sta	regation Method 👔 🖲 Count Issu		
Browser Add Sta	regation Method 👔 🖲 Count Issu		
Agg	regation Method 👔 🖲 Count Issu		
Agg		es 🔿 Sum Issues	
* Select Reporting Hierarchy *	Comparison 2 • None *		Output Report Definition 👔 🗆
			Wrap Values on Output 👔 🗆
	None	~	
elect Fields to Form Matrix Report			
ields Across Columns (X axis) 🔽	Fields Dow	n Rows (Y axis) 🕐	
Find a field Show field names	Find a field		Show field names
ommitted Release	cal Year Actual Ren	ewal Date	Assigned To
Contract Date Created - Fig.			
Contract Number Date Created Ma			
Created from ID # Report output opt	ions for this field		
Customer Contact			
Customer Email Display sub-totals			
Data Classed			
Alternate Field Title	•		
Date Created			
Date of Last Status Change			
Due by Grouping			
Employee Department V Month			6
iclude columns with no data 7			Sort on ? None *
Query Filters O Standard O Con Format		1000	Illowed Values in Filters ?
	~		
Advanced     O Ex		Filter M	lulti-Valued Field Values 👔 🛛
Select Field			
	operator value		
* Select *	~		
Run Report Save Report Save As Clear All Cancel Print Pag	0		

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 Occurred during																	
Date Created durir	ig Last	year															
Date Created, Dat	e Create	ed, Date	e Create	ed vs. Assig	ned To												
								20	14								Tota
			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					- 1
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	
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	3

# Adding Statistics to Matrix Report Output

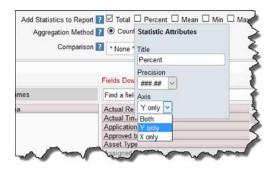
There are several options with the **Add Statistics to Report** checkboxes. You can elect to add Totals, the Percentage, the mean, the minimum, or the maximum to the report output. This may look similar to this:

Matrix Report Options		
Report title		
Browser  * Select Reporting Hierarchy *	Add Statistics to Report ? 2 Total Percent Mean Min Max Aggregation Method ? © Count Issues O Sum Issues Comparison ? None V	Display on Mobile ?

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.



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.

### **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
  - Test Cases --> Test Results as a single-level reporting hierarchy

Run Report Save Report Save As Clear			ExtraView Matrix Report
- Saved niter list -	Save / Update Filters		Comparison 💽 * None *
Select Fields to Form Matrix Report			
Fields Across Columns (X axis) 👔		Fields Down Rows (Y axis	) ?
Find a field	Show field names	Find a field	Show field names
Contract Number	▲ Date Created - Year	Actual Renewal Date	A Assigned To
Created from ID #	Date Created - Month	Actual Time (hrs)	Report output options for this field
Customer Contact	- mark	Application	
Customer Email		Approved by	Display sub-totals
Customer Name		Asset Type	Cost Martine Cost Annual Cost
Date Closed		Assigned To	Sort by (Sort direction)
Date Created Date Created		Automated Building	Field values (Ascending)
Date of Last Status Change		Bus, Priority	
Due by		Business Area	Alternate Field Title
Employee Department		Case Status	
Employee Name		Category	
End Date	×	Cell Phone	Hierarchy Level
Include columns with no data 🛜 🗆		Include rows with no data	Test Plan> Test Case
Perform count on Test Plan> Test Case	4		153L FIGH TESL GOSE
Query Filters		Filter Multi-Valued Fie	
Base level			
Select Field		Operator	Value
Project(PROJECT)		✓ equals ✓	Test Plans
and Date Created(DATE_CREA	(TED)	between	Jan 1, 2013 12:00:00 🖽 Dec 31, 2014 12:00:0
Test Plan> Test Case			
Select Field		Operator	Value
Project(PROJECT)		equals 🗸	Test Cases
Test Case> Test Result			
Select Field		Operator	Value
Project(PROJECT)		equals v	Test Results
Run Report Save Report Save As Clear	All Cancel Print Page		

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 rightclicking 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.

# **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:

Run Report Save Report	Save As Clear All Cancel F	rint Page	ExtraView Aging R	eport ?
Aging Report Options				
Report title				
Description				
Browser	~	Output	Report Definition <b>2</b>	
Select Status values to di	splay on report, and select th	e options to age the va	alues	
* Any *	1	Select the number of col	umns to display on the aging report 5	~
* None *	Select the tin	ne interval (hours or days) to	count for each column of the report 7	-
Not Yet Tested 🗸		Select the time	e units for each column of the report Days	~
Query Filters	Standard	O	ndensed Filters	
	O Advanced		panded Filters	
Business Area * Any *	Last Changed By	* Any *	Jays Since Last Updated	]
Keywords			Days Since	Ì
Search Attach	nents?		Created	
Category * Any *	✓ Status •	* Any *	Originator * Any *	~
Product * Any *	Customer Name	* Any *	Assigned To * Any *	~
Run Report Save Report	Save As Clear All Cancel F	rint Page		

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 section of the screen.

*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 report	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 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:

Aging Report	Refresh	Return Print Page			
ntire database					
Prepared by Bill Smith (	on March 7, 2006				
Status	0 - 7 DAYS	7 - 14 DAYS	14 - 21 DAYS	21 - 28 DAYS	> 28 DAYS
New	14	Q	Q	2	<u>92</u>
Not Yet Tested	Q	0	Q	0	Q
Tested - Passed	Q	Q	Q	Q	Q
Tested - Failed	Q	Q	Q	Q	Q
Open	16	3	1	Q	<u>50</u>
Fixed	10	Q	Q	Q	108
Closed	6	Q	Q	Q	<u>69</u>
Duplicate	Q	Q	Q	Q	17
Not Found	Q	Q	Q	Q	20

#### 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.

Aging Report Detail			Refresh Retu	urn Print Page
Prepared by Bill Smith on March 7, 2006				
ID# Title	Status	Assigned To	Timestamp	Time in Status
10263 Bill's equipment List to be reviewed	New		March 16, 2005	25 days
	Open	Jimmy Duncan	April 10, 2005	8 days
	Fixed	Jimmy Duncan	April 19, 2005	
10218 The GUI has a problem when you enter the status of the	New	Chris Robinson	January 25, 2005	0 days
issue	Open	Chris Robinson	January 25, 2005	9 days
	Fixed	Bill Smith	February 3, 2005	
10196 Save it to a file with a good name	UNASSIGNED	George Miller	June 30, 2004	182 days
	Open	Bill Smith	December 30, 2004	12 days
	Closed	Mary Brown	January 11, 2005	

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.

# **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 Repor	t Save As Clear All Ca	ncel Print Page			ExtraView Calendar Report 🔋
Calendar Report Optio	ons				
Report title					
Description					
Output to Browser			Output Report Definition 김 🗆		
* Select Reporting Hierarch	ny - 🔍				
Select Fields to Form (	Calendar Report				
• 2 Use	a date field at a single point in	time O 💽 Use a time span betw	een two date fields		
Date / Time ? None *	and a single point in	View 2 We			
			Collapse Toolbar		
Select Fields to Displa	and the second of the local second seco	Calendar Popup Description			
	Title Fields 👔		De	escription Fie	elds ?
Find a field	🗆 s	how field names	Find a field		Show field names
2nd Fold title	^		2nd Fold title	^	
Abstract			Abstract		
Actual Renewal Date			Actual Renewal Date		
Actual Time (hrs)			Actual Time (hrs)		
Address			Address		
Application			Application		
Approved by Asset Type			Approved by Asset Type		
Asset Type Asset details			Asset lype Asset details		
Assigned To			Assigned To		
Automated			Automated		
Building			Building		
Bus Priority	~		Bus Priority	Ý	
Query Filters	O Standard	Condensed Filters	* Saved filter list *		~
	Advanced	O Expanded Filters	Caved much list		
	C Auvanceu	Contraction of the states	Save / Update Filters	?	
Select Field		Operat	or Value	100	
Select *					
* 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		é
C 🕑 Use a date field at a sir	policipoint in time 🛛 💿 Use a time span between two date field	Is
Date / Time 🛞 * None *	🖌 Ending Date / Time 🌒 * None *	View 🕢 Week 🔽 Collapse Toolbar 🕢 🥅
Select Fields to Display on Calendar T	itle and Calendar Popup Description	
Title Fields ()		Description Fields 🕢

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.

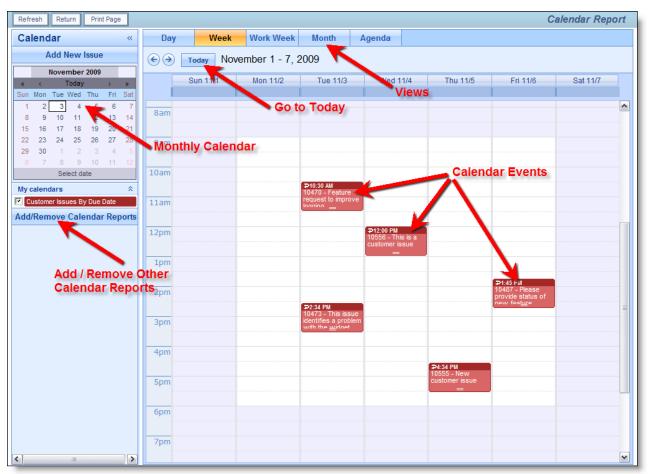
# Viewing the Output

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

Refresh Return Print Page	C	alendar Report
Calendar «	Day Week Work Week Month Agenda	
Add New Issue	€ → Today November 3, 2009	
November 2009	Tue 11/3	
« « Today » » Sun Mon Tue Wed Thu Fri Sat	10011/5	
1 2 3 4 5 6 7	Sam	<u> </u>
8 9 10 11 12 13 14 15 16 17 18 19 20 21	odili	
22 23 24 25 26 27 28	9am	
<b>29 30</b> 1 2 3 4 5 6 7 8 9 10 11 12		
Select date	10am	
My calendars	₽10:30 AM 10470 - Feature request to improve logging	
Contract Due Dates  Dates due for RMA product arrivals	11am	
Customer Issues By Due Date		
Dates Created Report	12pm	
Add/Remove Calendar Reports	1pm	
	100	
	2pm	
	₽2.34 PM 10/22. This issue identifies a scalar with the widest when a sustance bios to install 3 is accessible.	
	10473 - This issue identifies a problem with the widget when a customer tries to install it incorrectly	
	4pm	
	5pm	
	6pm	
	7pm	
<		

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.

Refresh Return Print Page						Са	lendar Report
Calendar «	Day V	Veek Work We	eek Month	Agenda			
Add New Issue	€ → Today	November 20	09				
November 2009	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Sun Mon Tue Wed Thu Fri Sat	1	2	3	4	5	6	7
1         2         3         4         5         6         7           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           6         7         8         9         10         11         12			10:30 AM 10470 - Eeaturerequest.to invasasulegging identifies a problem with the widget when a customer tries to	12:00 PM 10556 - This is a customer issue	4:34 PM 10555 - New customer issue	1:45 PM 10487 - Please provide status of new feature request	
6 7 8 9 10 11 12 Select date	8	9	10 install it incorrectly	11	12	13	14
My calendars  Customer Issues By Due Date Add/Remove Calendar Reports			12:00 PM 10490 - Showing daniel		12:45 PM 10488 - Performance issue with updating		
	15	16	17	18	19	20	21
		11:30 AM 10491 - Requirement to reply to warning	4:44 PM 10496 - Test customer issue	8:14 PM 10561 - Plan a replacement for the history module	11:30 AM 10486 - Request for upgrade		
	22	23	24	25	26	27	28
		11:45 PM 10489 - New request for feature	< 10489 - New request for feature				
	29	30	1	2	3	4	5
<							

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, N	ovember 8	3, 2009		
November 2009           «          Today         >           Sun Mon Tue Wed Thu         Fri Sat         1         2         3         4         5         6         7	Monday	Nov 9		10490 - 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		10488 - Performance issue with updating	
8 7 8 9 10 11 12 Select date My calendars	Monday	Nov 16		10491 - Requirement to reply to warning	
Add/Remove Calendar Reports	Tuesday	Nov 17		10496 - Test customer issue	
	Thursday	Nov 19		10486 - Request for upgrade	
	Monday	Nov 23		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	j.
Tuesday, November 3, 10:30 AM - 11:29 AM	3
Description:	
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	3
Product: Tracker	Þ.
Status: Fixed	
And the second and the second and the second of the second	

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.

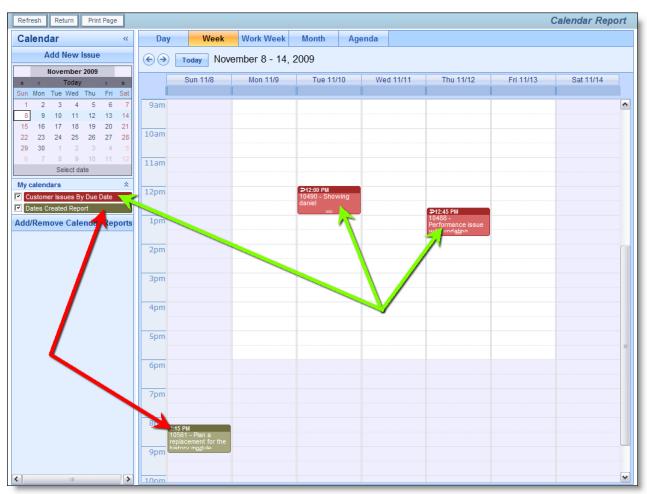
# Adding Additional Calendar Reports to the Current Report

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:

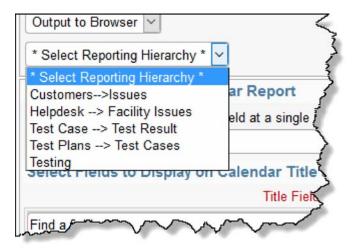
[hereiten and hereiten and here			Add or Edit R	ecurrence
issues are created	ue Directions you to take the current issue as children of the issue you vattern using this form.	e and copy it to other issue: have selected. You can cre	s at different points in time. ate recurring issues with a	The recurring daily, weekly,
Recurrence patter	'n			
Daily 💌	Every 1 day(s) 1 time	e(s)		
	Every 1	day(s)		
Range of recurrer 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**

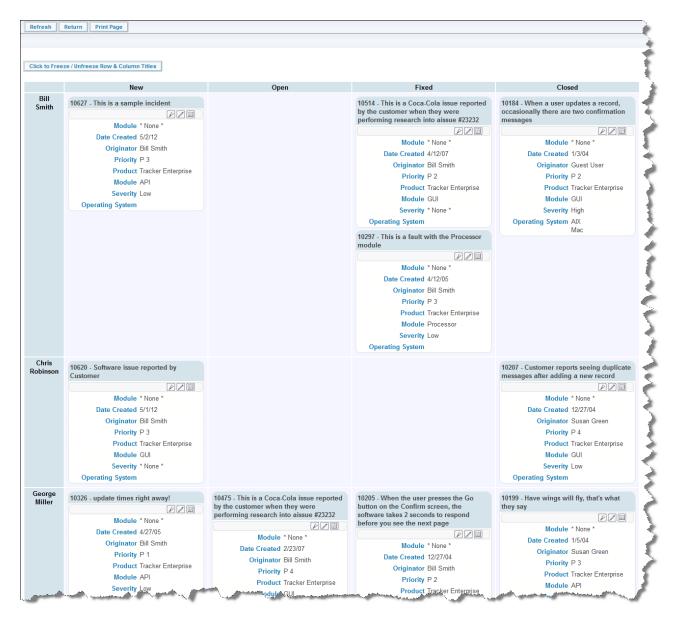
If your administrator has defined hierarchies on which you can report, you will see an additional prompt on the report editor screen:



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.

# **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.



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	All Cancel Print Page		ExtraView Taskboard Report ?
Taskboard Report Options			
Report title			
Description			128 mm
Output to Browser		Output Report Definition	on 👔 🗆
Select 1 to 4 Fields On Either Axis to For	rm the Report		
Choose fields to be displa		Choose fields to be display	red 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	10
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 Displaye	d as the Title and as the Description		
Title Fie		Description F	Fields ?
Find a field	Show field names	Find a field	Show field names
Test Case ID	^ ID #	Notepad	∧
Test Case ID	Title	Notes	Date Created
Test Case ID		Notes	Originator
Test Case Keywords	-	Number of Attachments	Priority
Test Plan Approver	-	Occurrence	Severity
Test Plan Complete Approver	-	Operating System	Operating System
Test Plan Complete Date	-	Originator	Quickedit Button
Test Plan ID	-	Other Application	Edit Button
Test Plan Name	-	Other Info	View Button
Tested In Build	-	Owner	
This is the 3rd fold		Parent ID #	
Time on call Title		Parent Issue	
tue	×	ratent issue	v
		Display  Fields  OButtons	
Query Filters	Condensed Filters * Saved filter list		owed Values in Filters 🔽 🗌
Advanced	Expanded Filters Save / Update		
Select Field		Operator Value	
Business Area(AREA)		equals v Bugs v	
and Status(STATUS)		v equals v New v	
Run Report Save Report Save As Clear	All 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.

# **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 issues). 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 As Clear A	II 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 Options		
Field to Use for the 1st Column of Row Titles 👔	* None *	v
Field to Use for the 2nd Column of Row Titles	* None *	V
Field to Use for the 3rd Column of Row Titles	* None *	Formatting
Grid Title Field	* None *	Number of columns to display 2 30
Starting Date / Time Field ?	*None *	Show background grid ?
Ending Date / Time Field 2	* None *	Display color key using this field 👔 * None *
Select Business Area for Drilldowns 👔	Customer Issues	
Select Project for Drilldowns	Customer Support Issues Data	
Parent ID Field 김	* None *	
Query Filters   Condensed Filt  Expanded Filt	Curva mor	Use Allowed Values in Filters 👔 🗆
	Save / Update Filters ?	
Select Field	Operator Va	ue
Select *	~	
Run Report Save Report Save As Clear A	II 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.

# 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.

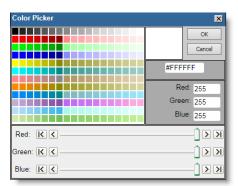
There is a button to the right of the Report Title that appears when you are editing an existing chart. When you place your mouse over this button, you will see who created the chart, who last updated the chart and the dates when these actions occured. This is most useful for managing public reports.

#### **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 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
- 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

- 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	
Output to Browser	Display on Mobile 🛜 🗆 Output Report Definition 😨 🗆
Select chart type 7 Select field to chart	Select values to chart Report Date ?
Pie chart V Status(STATUS)	<ul> <li>None *</li> <li>Select All *</li> <li>New</li> <li>Not Yet Tested</li> <li>Tested - Passed</li> <li>Tested - Failed</li> <li>Open</li> <li>Fixed</li> <li>Closed</li> <li>Duplicate</li> </ul>
Chart Attributes	
2D or 3D ● 2D ○ 3D Legend ○ On ◎ Off Percent ○ On ◎ Off Label ● On ○ Off Values ○ On ◎ Off Display legend separately Display table of results □	Color scheme Pastel colors
Image width 650 Image height 450 Pie slice to explode 22 * Select a Value * v	Background color
Query Filters O Standard * Saved filter list *	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.

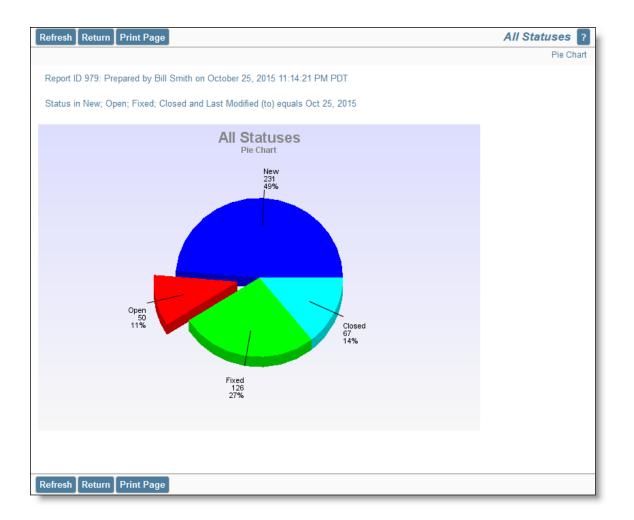
# **Pie Charts**

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:



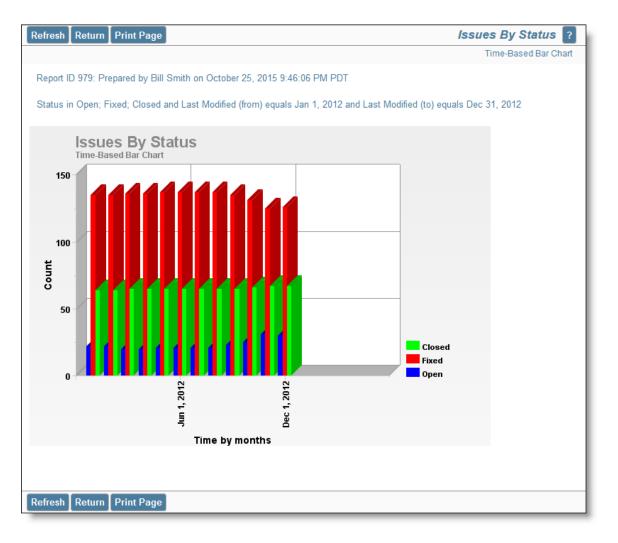
# **Bar Charts**

#### **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:

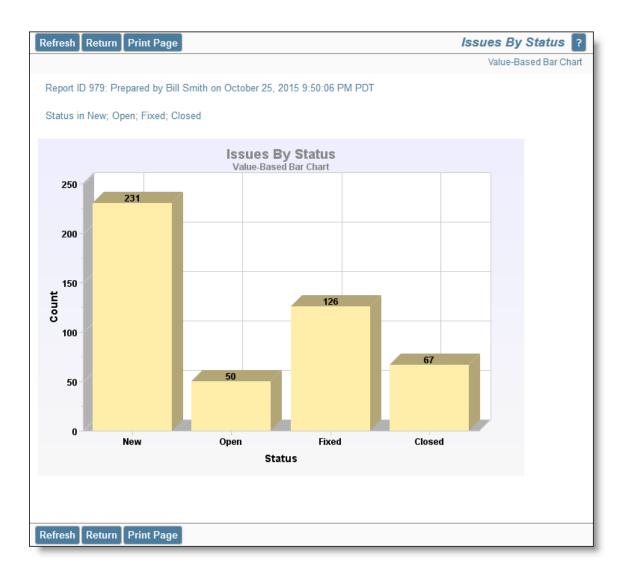


#### Value-Based Bar Charts

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**

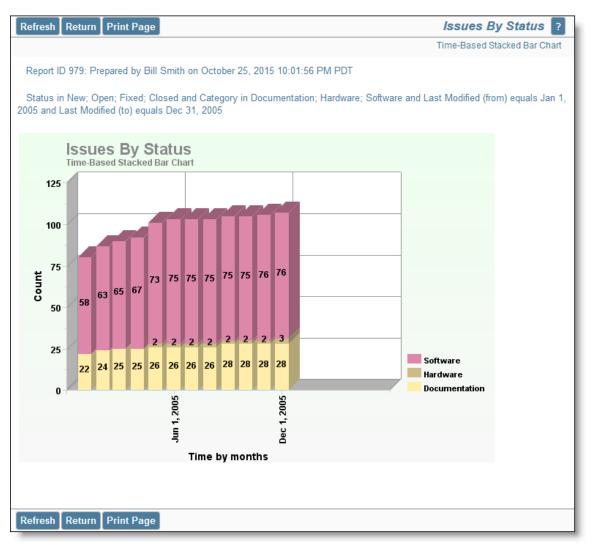
#### **Time-Based Stacked Bar Charts**

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:

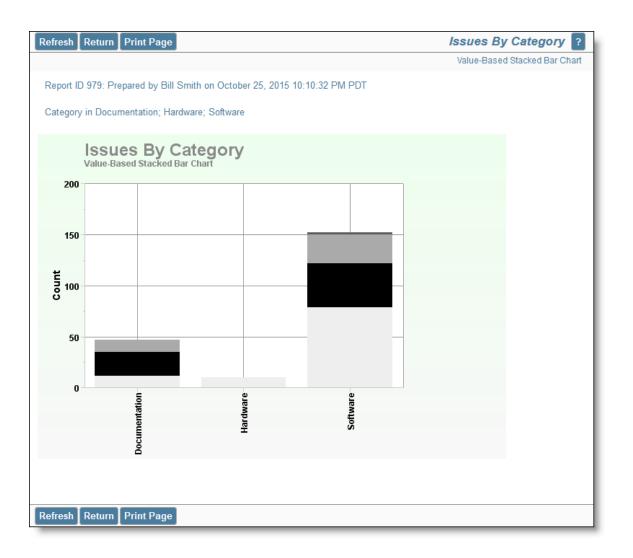


#### Value-Based Stacked Bar Charts

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:

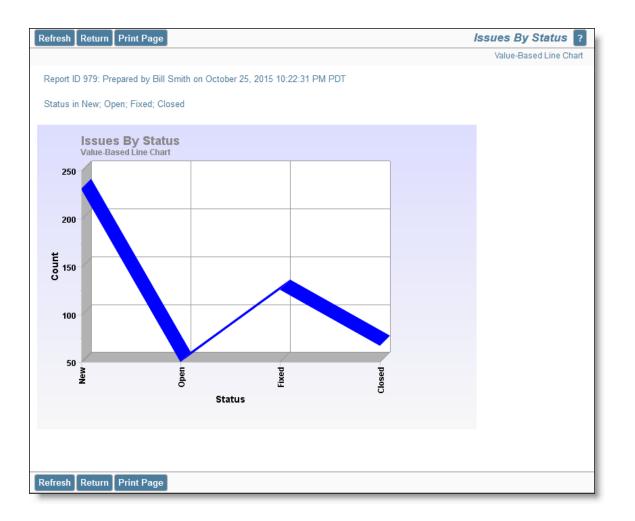


#### Value-Based Line Charts

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

A sample value-based line chart looks like this:



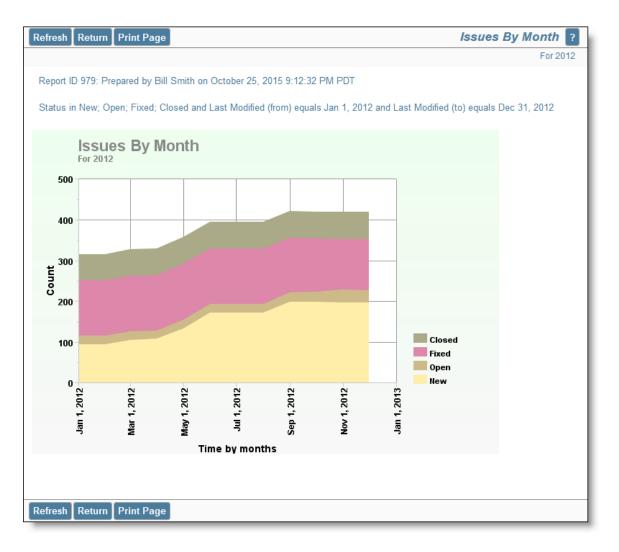
### **Area Charts**

### **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:

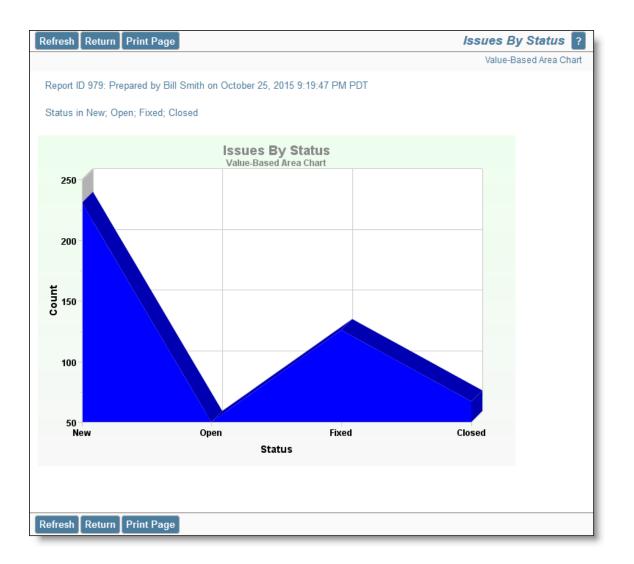


#### Value-Based Area Charts

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

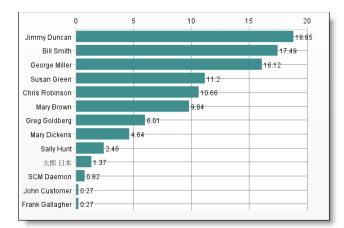
A sample value-based area chart looks like this:



### **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:



### **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.

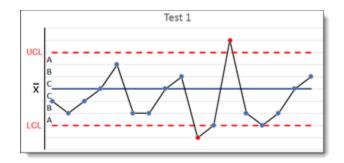
The ExtraView documentation is not intended as a thorough treatise on the use and interpretation of control charts. The user is expected to be familiar with the concepts and to understand the topic.

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 $\sigma$  from the Mean line and the LCL is -3 $\sigma$  from the Mean line.

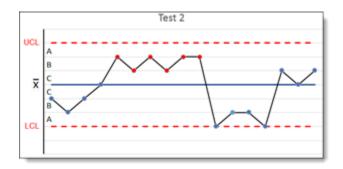
Visible indicators are used to identify data points that signal areas of concern. Points on the chart that are deemed to be behaving in an unusual way are referred to as *Special Cause* points. These points are colored red.

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:

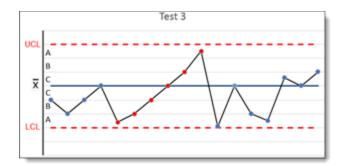
Test 1: Any point outside of the Upper and Lower Control Limits



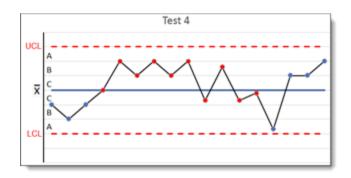
Test 2: 5 points in a row on the same side of the Mean line. (Default is 9)



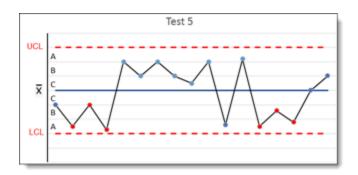
Test 3: 6 points in a row increase or decreasing in the same direction (Default is 6)



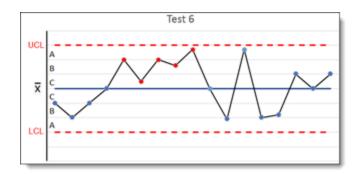
Test 4: 10 points in a row in alternating directions. (Default is 14)



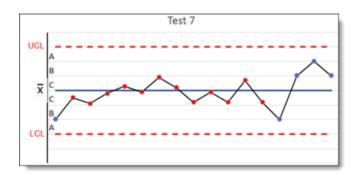
Test 5: 2 out of 3 points more than  $2\sigma$  from the Mean line (same side). This would be points outside of sections B and C on the graph. (Default is 2)



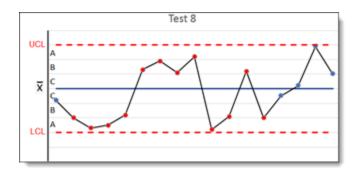
Test 6: 4 out of 5 points more than  $1\sigma$  from the Mean line (same side). This would be points outside of section C on the graph. (Default is 4)



Test 7: 12 points in a row within  $1\sigma$  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  $1\sigma$  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:

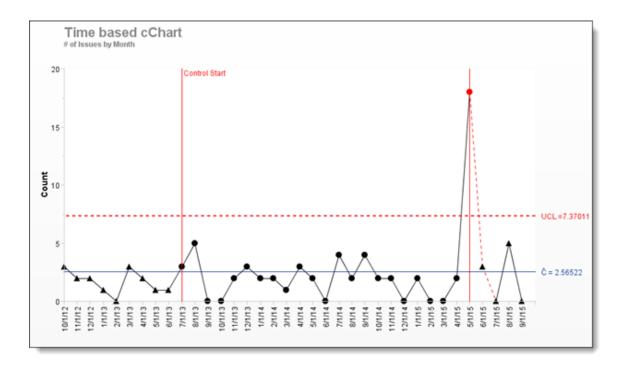
Create Chart Save Report	Save As Clear All Cancel Prin	it Page					E	traView Charts
Chart Options								
Chart title								
Description								
Output to Browser				Use reporting h	nierarchy * None *	÷		
				Display on N Output Report Defi				
Select chart type 👔	Select date field to chart		Select Special	Cause tests		Data Options 👔		
Time-based Control cChart	Select field from list *		Test 1 Any po	nt outside of the Upper and Lower C	ontrol Limits	Timeframe	O By Date	By Previous Periods
						# of Periods for Report Data		
				nts in a row on the same side of the		# of Periods for Control Data		
			Test 3: 6 poi	nts in a row increasing or decreasing	g in the same direction	Increment	by days	~
			? Test 4: 14 po	nts in a row in alternating directions		Skip labels on X-axis	0 ~	
			Test 5: 2 out	of 3 points more than 2 $\sigma$ from the c	enter line (same side)	Set Threshold Value	[	
				of 5 points more than 1ơ from the c		Omit trailing intervals		
			7 Test 7: 15 po	nts in a row within 10 of the center in nts in a row more than 10 of the cen	ine (either side)	Choose Excluded Control Dates	* None * * Select All	
Chart Attributes								
	Values Display table of results Add drilldown links to chart			Plot area color	FF 🔡			
	Image width Image height Display vertical grid lines Display horizontal grid lines	450		Background color	FF 🔡			
	Max number of points							
		* Saved filter list *	~					
Query Filters			51		Use Allowed	l Values in Filters 👔 🗆		
Query Filters	Advanced	Save / Update Filters	1					
Query Filters Select Field	Advanced	Save / Update Filters Operator	Value					

- 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

**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.

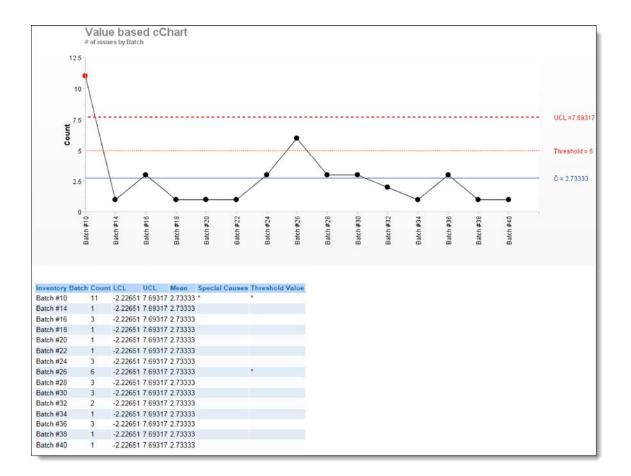
A sample time-based control cChart is shown here:



#### 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**

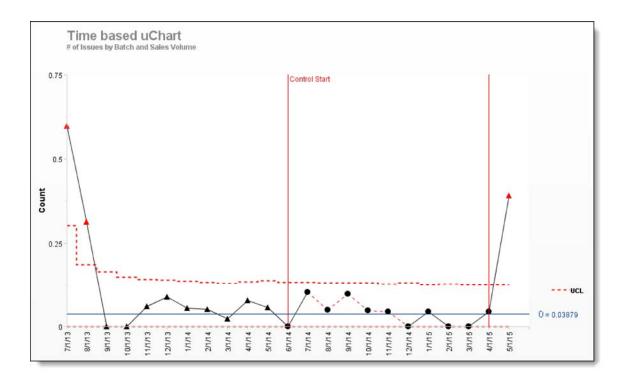
uCharts are a type of control chart used to monitor "count"-type data where the sample size is greater than one, typically the average number of nonconformities per unit. Time-based control uCharts are used if the same sample size is variable. uCharts allows the user to select a date field to be used 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:

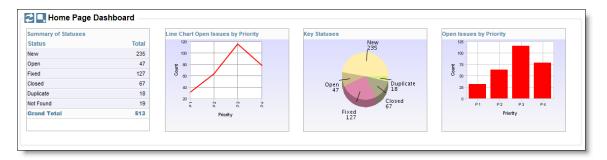
- Select the Time-based Control uChart from the selection list of chart types
- Select a Date field to chart from the list
- Select a Date field to aggregate volume by from the list
- Select field for volume amount from the list of numeric type fields

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



## **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 Pri	int Page							L	ExtraView 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 Width 2	ю Н	eight 200	Test	Width 250	Height 200	Test	Width 250	Height 200	Test
Example Output										
Global Query Filters 7										
Select Field		Operator	Value							
Select *										
Save Report Save As Clear All Cancel Pri	int Page									

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 I	Print Page		ExtraView Dashboa	rd 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 Issues by Priority				
Global Query Filters ?				
Select Field	Operator Value			

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 Pa	ge										ExtraView Dashboa	rd 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	Public Bugs by Priority	by Status.	Matrix rep	port			" Select a report "			* Select a report *		
Width 250 Height 200	est Width 350	Н	leight 2	20		Test	Width 250	Height 200	Test	Width 250	Height 200	Test
Example Output												
Open Issues by Priority	Bugs by Priority by S	Status										
125		P1	P 2	P3	P4	Total						
100	New	4	8	7	15	34						
¥ 75	Not Yet Tested				1	1						
3	Open	2	7	4	6	19						
	Fixed	11	19	1	25	56						
2	Closed	4	6		19	29						
0 P1 P2 P3 P4	Duplicate		- 1		4	8						
Priority	Not Found Total	22	46	12	76	165						
	TO MARK	"		14	10	100						
Global Query Filters ?												
Select Field		Operator	Va	alue								
Select *												
	_											
Save Report Save As Clear All Cancel Print Pa	ge											

Placing a second report on a Dashboard

Save Report Save As Clear All Cancel Print Pag	je											ExtraView Dashboar	d 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	T P	ublic Bugs by Priority by St	atus, Matrix	report			•	Public:Summary of A	All Issues, Chart of All Status	-	Public:Summa	ry of Statuses, For Home Page Dashboa	
Nidth 250 Height 200 Te	watt Wi	dth 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 S	Status						Summary of All Issues			Summary of Statuses	
125			P 1	P 2	P 3	P.4	Total					Status	Total
130		New	4	8	7	15	34		7	ew 15		New	235
2 3		Not Yet Tested				1	1					Open	47
8		Open	2	7	4	6	19		and the second se			Fixed	127
~		Fixed	11	19	1	25	56		Open	Not Found		Closed	67
25		Closed	4	6		19	29			19		Duplicate	18
0 P1 P2 P3 P4		Duplicate		4		4			Cont.	Duplicate 18		Not Found	19
Principy		Not Found	1	2		5			Fixed 127	Closed 67		Grand Total	513
, mark		Total	22	45	12	76	155			67			
lobal Query Filters ?													
Select Field		Opera	tor	Value									
Select *													
ave Report Save As Clear All Cancel Print Pag													

#### 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.

# **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	oort Clear All Cancel Print Page	ExtraView Custom URL Report 👔
Custom URL Rep	port			
Report title Breakd	lown of Customer Issues		2	
Description	Custor	m Pie Chart	Localize	
Output to Browser	~			
500 rows per page	~			
URL for Report				
Enter URL address	for report p_option=use	ercustom.CustomChart&p_acti	ion=doRunCustom&chart_type=pie&field_to_cha	art=CUST_LIST&title=Breakdown of issues by customer&c_
encounter problems a	and program exceptions.		o a custom code location within ExtraView. If you ow when in Workspace mode.	u 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	3
00	Business Area(AREA)		🗠 equals 🗠 Cus	stomer Issues
and 🖂	Customer Name(CUST	_LIST)	v not equal v * No	one *
Run Report Save	Report Save As Sc	hedule Report Delete Rep	oort Clear All Cancel Print Page	

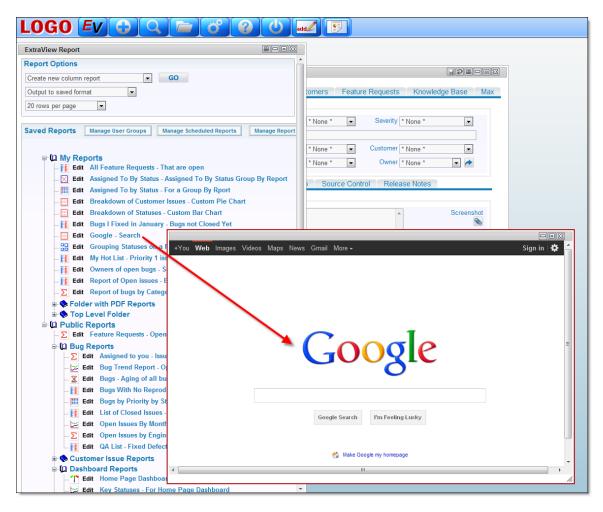
Preparing a Custom URL report that executes code within the ExtraView environment

#### **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 Report	Save As So	hedule Report Delete Rep	ort Clear All Cancel P	rint Page	ExtraView Custom URL Report ?
Custom UF	RL Report					
Report title	Breakdown of C	ustomer Issues		?		
Description		Custo	m Pie Chart	Localize		
Output to B		v				
URL for Re		rt [	and a factor			
Enter an abs encounter pro	olute path (begin oblems and progr	ning with http:// am exceptions	or https://) or a relative path to			ter an invalid address and run this report, expect to
Select Filte		) Standard Advanced	Condensed Filters     Expanded Filters	* Saved filter list * Save / Update Filters	?	Use Allowed Values in Filters 👔 🗆
Select	Field			Operator Va	lue	
Sele	ect *			~		
Run Report		Save As So	hedule Report Delete Rep		rint Page	

Creating a Custom report that accesses the Google search engine



The Google search screen within a workspace

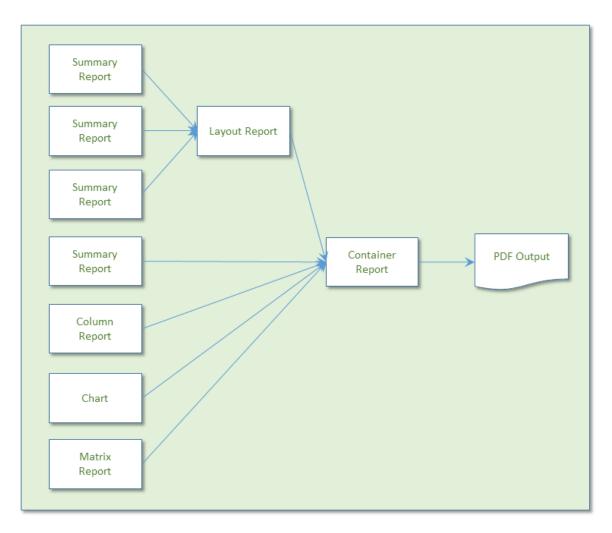
# **Report Layouts / Container Reports**

### **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:

	er 2 Colum		acker	3rd Column Tracker Enterprise	4th Colun		Total	
Open Issues			acker 2	1 racker Enterprise	Tracker L	1		4
Fbood Issues			21	7	-	3	-	31
Closed Issue	6		3	4		3	1	0
Total			26	12		7	4	15
	Category			e group by lay	out			
This is the	legend for t			reports				
Category			oumania		ging	15	Software	13
			_					
Open Iss	ues					_		
			U	egend goes here				
ID#	Status		Title	Descriptio	n	Days in		group b
10475	Open	This is a Coca-		Here is the description		Státus 75	layout	with 1 r
10470		reported by the	customer when ming research	issue. Here is the des this issue. Here is the of this issue. Here is t description of this issue	cription of description			
Open Iss	ues			Colum	n Repo	t		
	ues		L	Column egend goes here	n Repo		Animat	
Open Iss ID #	Status		L			Days in Status	Assigned To	Owner
ID #	Status			egend goes here Description the description of this is the description of this is the description of this issue. Here is the description issue. Here is the description of this iss the description of this issu the description of this issu the description of this issue. Here is the description of this issue the description of this is the description of this issue. Here is the description of this issue the description of this issue. Here is the description of this issue the description of this issue. Here is the description of this issue the description of this issue. Here is the description of this issue the description of this issue the description of this issue. Here is th	n issue. Here is issue. n of this cription of description be be. Here is issue. Here is issue. n of this cription of description he be. Here is issue. Here is issue. Here is issue. Here is issue. Here is issue. Here	Days in Status	To	
ID#	Status	Test	Titlə	egend goes here Description the description of this is the description of this is the description of this issue. Here is the description of this issue. Here is the description of this issue the description of this issue the description of this issue. Here is the description of this issis the description of this issis is the description is the description is issis is the description of this issis is the description is the description is the description is issis is the description is the description is issis the description is the description is the description is the description is t	n issue. Here is issue n of this cription of description the ue. Here is issue. Here is issue. n of this cription of description the ue. Here is issue. Here is issue. Here	Days in Status	George	Chris
ID #	Status	Test	Title	egend goes here Description the description of this is the description of this is the description of this issue. Here is the description of this issue. Here is the description of this issue the description of this issue the description of this issue. Here is the description of this issis the description of this issis is the description is the description is issis is the description of this issis is the description is the description is the description is issis is the description is the description is issis the description is the description is the description is the description is t	n issue. Here is issue n of this cription of description the ue. Here is issue. Here is issue. n of this cription of description the ue. Here is issue. Here is issue. Here	Days in Status	George	Chris

# **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 Double Group By Report C Column Report C Chart	
Report title De:	scription
Select a query field to group your report by. The list of fields shown below are titles in columns, the values from the group by query will appear across the re by query will appear as rows on the report. You can then select the query for reports shown below. Set the number of reports to include in the group report Render titles in Columns Select query field to group by Product (PRODUCT_NAME) Report header style and text Column header style Remove empty columns Calculate Totals Data display style	eport. If you select to render the titles in rows, the values from the group r each row or column that will appear on the report output from the list of
Queries to Group - Select at least one report	
Number of queries to include in group 1	
Report 1 * Select a report *	splay for this row
Optional Report Headers	
Number of additional header rows to place above data 0 💌 Header titles for Row 1 Number of titles 1 💌 Title text 🛕 Column span 1 💌	Report Header       Row 1 Hdr     # titles="4"       Col span="2       Title text       Col span="2       Col span="2       Col span="2       Title text       Title text       Title Text       Title Text       Row Title 123       Title Text       Title Text       Title 123       Title 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  $\triangle$  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

late Report head	er style and text	Save Cancel Print P
Font	Arial	
Size	48 00	
Style	Italic Y	
Weight	Normal M	
Text color	esscore	Sample Text
Background color	#6600FF	
Horizontal alignment	Left M	
Vertical alignment	Тор	
		Save Cancel Print P

- 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 🕜 Double Group By Report 🕜 Column	Report C Chart C
Report title Grouping of Status Reports	Description Used as input to a PDF container report Localize
titles in columns, the values from the group b by query will appear as rows on the report.	The list of fields shown below are those that match the queries you can select. If you select to render the by query will appear across the report. If you select to render the titles in rows, the values from the group . You can then select the query for each row or column that will appear on the report output from the list of ports to include in the group reports, then choose the report for each row or column of the report.
Render titles in Columns	
Select query field to group by Product (PRODUCT_NAME)	
Report header style and text A Grouping different status reports togeth	
Legend text and style	Report 1 Report 2 Report 3 Report 4 Tale Tale Tale Tale
Column header style	Val 1 Val 2
Remove empty columns	Val 3
Remove empty rows	Val 4
Calculate Totais	
Data display style	
Queries 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	Title to display for this row Open Issues Title to display for this row/Fixed Issues
Report 2 Personal:Summary of Fixed Customer Issues, By Product	Title to display for this row Closed Issues
	Libsea issues
Optional Report Headers	
Number of additional header rows to place above data	Report Header
Header titles for Row 1 Number of titles 3	Row 2 Hdr # titles=7 Col span=2
Title text A Header over 2 Columns	Column span 2 A
Title text A 3rd Column	Column span 1 x
Title text  4th Column	Row Title         123         1
	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 Reports								
Sample Report								
Grouping different status	reports together							
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**

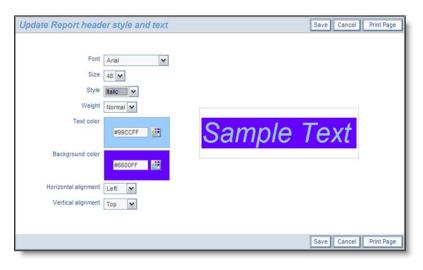
Double group by layouts are prepared by first designing a summary field, with two fields selected as the object of the summary list. For example, you may prepare a Summary report using the **Assigned to** and the **Product** fields. Any filters may be applied to this report.

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	e Report	Save As	s Clea	ar All	Cancel	Print Page
Double Group By Report Single Group By Report	Double Group By Report	Column Report	Chart C							
Report title			D	escription						
Render titles in Select report to run	Columns	with the first field rendered	d as the columns a	ind the second f	field render	red as the n				
Report header style and text	A		7		Rer	oort Hea	der			
Legend text and style					Field 1 Val 1		Field 1 Val 3	Field 1 Val 4		
Column header style	A			Field 2 Val 1	123	123	123	123		
Row title style	Δ			Field 2 Val 2	123	123	123	123		
Do not display empty columns				Field 2 Val 3	123	123	123	123		
Do not display empty rows				Field 2 Val 4	123	123	123	123		
Calculate Totals								_		
Data display style	Δ									
Optional Report Headers										
Number of additional header ro	ws to place above data 0 💌			Ro	w 1 Hdr w 2 Hdr lie text T t t t t t t t t t t t t t t t t t t	# titles	tles=4	Col sp: t Title e Tale t text I Col e Tale 3 123		
				Save	Report	Save As	Clea	ar All	Cancel	Print Page

### Preparing a double group by report

To prepare the report:



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 Repor	t Save As	Delete Report	Clear All	Cancel	Print Page
Double Group By Report Single Group By Report	Double Group By Report 🕞 Column Re	eport 👩 Char	t 🙆					
Report title Render titles in	Assigned To By Status Select a report. The list of possible queries are group by query will be a matrix with the first fir render the titles in rows as opposed to column Rows	eld rendered as the	columns and th	fields selected on e second field ren	dered as the rows	. The results of		
Select report to run Report header style and text	Personal:Assigned To by Status, For a Group B	ly Report	<b>•</b>	Re	port Header			
Legend text and style	Assigned to by status			Field 2 Val 1	Field 2 Field 2 Val 2 Val 3	+		
Column header style Row title style	<b>A</b>			Field 1 Val 1 123 Field 1 Val 2 123	123 123 123 123	123 123		
Do not display empty columns				Field 1 Val 3 Field 1 Val 4 123	123 123 123 123	123		
Do not display empty rows Calculate Totals			L	Val 4			1	
Data display style Optional Report Headers	<u>A</u>							
	ows to place above data 0 💌			Row 1 Hd Row 2 Hd Title text Row Title Row Title	# titles=7       Title text     Title       Tale     Tale       Tale     Tale	text Title t text Title t text Col span text text t text text t Col Col Col Tale Title T 123 123 1	=2	
			Save Repor	t Save As	Delete 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**

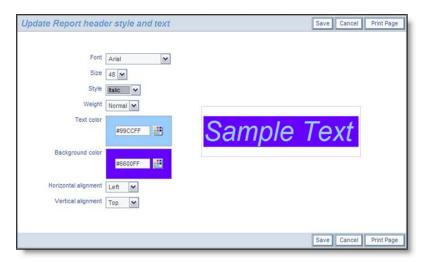
Column reports as layouts are prepared by first designing the column report. The column report is any column report that you create, with any filters.

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	Save As	s Clear All	Cancel	Print Page
Column Report Single Group By Report  Report title	Double Group By Report	Column Report 💽 Cha	rt C	10				1	
Select report to run	Select a column report to run. Yo	ou may set a header and style		and the second	ing options.		V		
Report header style and text Legend text and style Column header style Row title style Data display style	2 A			Title text Row Title Row Title Row Title	Report I Title text Tele Tele text text Col Col Tele Tele 123 abo 123 abo 123 abo	Title text Tale Tal text tex Col Co Tale Tal 123 123 123 123	t Title text le Tale Tale t text text l Col Col e Tale Tale 3 abo 123 3 abo 123		
Optional Report Headers Number of additional header row	vs to place above data 0 💌			Row	1 Hdr 2 Hdr text Title Title text Col Title 123	Title Title text text Col Col Title Title 123 120	e text Title t text Title t text text Col spar	ext Trile text Col File	
				Sav	ve Report	Save As	S Clear All	Cancel	Print Page

### Preparing a column layout

To prepare the report:



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 strangelooking 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 C Double Group By Report C Column Report C Report title Open Issues	Chart C
Report title Open Issues Select a column report to run. You may set a header and t	Description Open Issue Report Localize Style for the report with the remaining options.
Select report to run Public: My Open Issues, for Home Page	~
Report header style and text  Open Issues	Report Header
Legend text and style	Title text         Title text         Title text           Table         Table         Table         Table           Table         Table         Table         Table           Table         Table         Table         Table           Table         Table         Table         Table
Column header style	Col         Col         Col         Col         Col         Col           Tate         Tate
Row title style	Row Title 123 abo 123 123 abo 123
Data display style	Row Title 123 abc 123 123 abc 123
Optional Report Headers	
Number of additional header rows to place above data 0	Report Header <th< th=""></th<>
	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 I	ssues										
ID #	Business Area	Product	Module	Last Modified	Priority	Severity	Title				
10529	Helpdesk	Tracker		6/27/07 10:01 AM	Р3	Low	Authorization to provide a new computer for new employee - Tom Hogye				
10525	Helpdesk	Tracker		6/27/07 10:02 AM	Ρ3	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	Ρ3	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 C	lear All Cancel	Print Page
Chart Report							
Single Group By Report	Double Group By Report	Column Report	Chart 🕝				
Report title			Description	1			
Select chart to include Report header style and text Legend text and style	<b>A</b>	ay set a header and style	for the report with the re		ort Header		
Data display style	Δ						
			[	Save Report	Save As C	lear All Cancel	Print Page

Preparing a chart layout

To prepare the report:

Update Report head	er style and text	Save Cancel Print Page
Font Size	Arial 💌	
Style	Normal V	
Text color	#99CCFF	Sample Text
Background color	#6600FF	
Horizontal alignment	Left M	
Vertical alignment	Тор	
		Save Cancel Print Page

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.

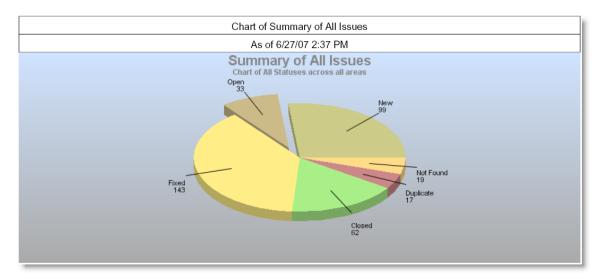
## **Example Chart Layout**

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 Report Save As Delete Report Clear All Cancel Print Page	
Column Report Single Group By Report C Double Group By Report C Column Report C	Chart C Description Open Issue Report Localize	
Select a column report to run. You may set a header and st	yle 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	Title text         Title text         Title text           Title text         Title text         Title text         Title text           Table         Table         Table         Table         Table           Coli         Coli         Coli         Coli         Coli         Coli           Table         Table	
Row tile style  Data display style	Row Title         123         abc         123         123         abc         123           Row Title         123         abc         123         123         abc         123           Row Title         123         abc         123         abc         123         abc         123           Row Title         123         abc         123         abc         123         abc         123	
Number of additional header rows to place above data	Report Header       Row 1 Hdr     # titles=7       Col span=1       Title text       Title text <th co<="" th=""></th>	
	Save Report 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 Delete Report Schedule Repo	rt Clear All Cancel Print Page	ExtraView Report	Container <b>?</b>
Report Container Options			
Report container title	Grouping Statuses on a PDF Report	?	
Description	How a PDF Report is Generated		
Report Title			Α
Report Legend			Α
* Saved filter list *   Save / Update Filters			
Select Overall Page Settings - Used for PDF Output Only			
Page size Letter ▼ Orientation Landscape ▼ Measurement inches ▼ Output Report Definitions ■ ?	Left margin	Right margin	
Page Headers ? Left Center	A	Right	A
		rught	
Summary of Products - For Input to a Container Report	columns of reports 1 •	Render reports by Columns	
Ignore Replacm	ent Filters 🔲 ?		
Report of bugs by Category - Counting new, open and fixed bugs only Ignore Replacm	vent Filters		
Issues By Status - Value-Based Area Chart Ignore Replacm	vent Filters		
Page Footers ?			
Left Prepared by Bill Smith Center	A	Right	A
Advanced Options			
Run Report Save Report Save As Delete Report Schedule Repo	rt Clear All Cancel Print Page		

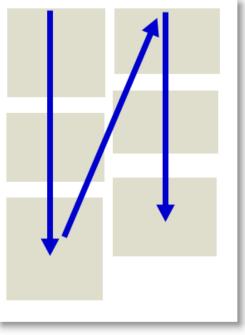
#### Report Container Screen

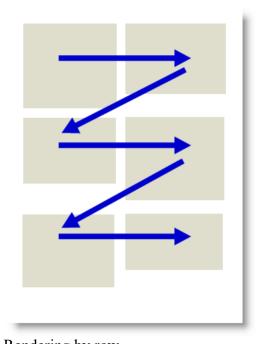
Update Report head	er style and text	Save Cancel Print Page
Font	Arial	
Size	48 💌	
Style	Italic 🗸	
Weight	Normal 💌	
Text color	#99CCFF	Sample Text
Background color	#6600FF	
Horizontal alignment	Left 💌	
Vertical alignment	Тор	
		Save Cancel Print Page

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.
- 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 <br> 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 column

Rendering by row

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:

			How a l	PDF Report is Generated				
Groupir	ng differe	nt status r	eports together					
Header ov	er 2 Colum	ns		3rd Column	4th Colum	n		
			Tracker	Tracker Enterprise	Tracker Li		Total	
Open Issues			2	1		1	4	
Fixed Issues			21	7		3	3	1
Closed Issue	S		3	4		3	10	
Total			26	12	7		45	
	Category							
	Category legend for	the report	Decumentation	Hardware	Packaging		Software	
		the report	Documentation 5	Hardware 3	Packaging	5	Software 3	3
This is the	legend for	the report	5			5		3
This is the Category	legend for	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 report ID of the report, as stored in the database
\$\$CONFIDENTIALITY_MESSAGE\$\$	The value of 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:

<b>▼</b> Ad	vanced Options			
Sele	ect Summary Report to Group Container Report Output ?			
	* Select a report *	$\sim$		
Run	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*.

### **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.

# **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.

										Records 1 to 20 of 38
epare	d by E	Bill Smith on	1/28/08 2	:46 PM						
			ID#	Business Area 🔺	Product -	Module •	Last Modified	Priority -	Severity =	Title -
~	Edit	Qedit	10571	Bugs	ter	GUI	10/24/07 1:20 PM	P1	High	Here is the title of the issue
~	Edit	Qualit	10337	Bur Quickedit R	tow ter		12/11/07 2:08 PM	P 1	Low	This is a demo of P4 interface
w l	Edit	Qedit	10326	Bugs	ter		12/11/07 2:08 PM	P 1	Low	update times right away!
-	Edit	Qualit	10323	Bugs	Tracker	GUI	12/14/07 12:17 PM	P1		new java file changes
	4	opdate	ID #	Business Area	Product	Module	Last Modified	Priority	Severity	Title
	-	Cancel	10278	Bugs	Tracker M		12/11/07 2:07 PM	P1 M	* None * M	User requests information on how to format text
		Cancel								
	Edit	Qudit	10272	Bugs	Tracker	GUI	12/14/07 12:49 PM	P 1		This will be mapped to EV
-	Edit	Qedit	10268	Bugs	· · · · · · · · · · · · · · · · · · ·	Database	12/11/07 2:07 PM	P 1	Low	Customer server is down and requires immediate attention
_	Edit	Qedit	10254		uickedit buttons			P 1	Medium	Problem with the GUI widget
_	Edit	Qudit	10241	Bugs				P1		This is a new job
_	Edit	Qedit	10240	Buge	Tracker			P 1		I have a problem with this computer
_	Edit	Qedit	10239	ougs	Tracker			P 1		This will become the title in ExtraView
_	Edit	Qualit	1 4 58	Bugs	Tracker			P1		This is a new issue entered about the need for web searches
_	Edit	Qedit	10237	Bugs	Tracker	Database		P 1	High	This is a new job in P4 being mapped to EV
_	Edit	Qedit	10236	Bugs	Tracker			P 1		When the administrator logs in, he will see a new report
-	Edit	Qudit	10229	Bugs	Tracker		7/3/07 8:24 AM	P1		Here is the title for all to see
_	Edit	Qedit	10228	Bugs	Tracker			P1		Here is the title for ExtraView
_	Edit	Qedit	10227	Bugs	Tracker Tracker		1/27/05 9:55 PM	P1		Problem with flat buttons
_	Edit	Qedit	10226	Bugs		GUI	12/11/07 2:08 PM	P1 P1	Low	Provision of TNCP problem
_	Edit	Qedit	10189	Bugs	Tracker Enterprise Tracker Lite	GUI	4/10/05 9:01 PM 6/30/04 1:07 PM	P1 P1	Low	Build it and they will come
-	East	Qear	10101	Bugs	Tracker Lite		6/30/04 1:07 PM	P1	Low	A single swalow does not a spring make
										Records 1 to 20 of 38

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 wanted 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 you are currently sitting in one Business Area, 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
- 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		The month the issue was closed (useful when summarizing information)

	Date Closed Month	
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	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:

d the Projectfields. iness Area ject (PROJECT) is that you do not wa	e Project field, th . Check here to co	e mass update function clones the issues into the values you select fo nfirm the clone operation.	Bug	s 💌	×
d the Projectfields. iness Area ject (PROJECT) is that you do not wa	. Check here to co	nfirm the clone operation.	Bug		
ject (PROJECT) Is that you do not wa	ot to undete to the o				
is that you do not wa	nt to undate to the o		Test	Cases	
,	nt to undate to the o				×
	in to update to the fi	ew value			
Current value	Parent value	Title		Business Area	Project
i Test Cases	Test Cases	Check the database connection works correctly		Test Cases	Test Cases
Test Cases	Test Cases	We need to check that the sign on screen works correctly to the following spe	cification	Test Cases	Test Cases
Test Cases	Test Cases	Check the version number of the install file		Test Cases	Test Cases
Test Cases	Test Cases	Check the voltage on pin 5 does not exceed 2.4V		Test Cases	Test Cases
Test Cases	Test Cases	Check how many commands are in the stack		Test Cases	Test Cases
i Test Cases	Test Cases	Check user can log into CLI via telnet		Test Cases	Test Cases
ere to check or unche	eck all the issues in t	he list			
			Clone all re	ecords Cancel	Print Page
	Test Cases Test Cases Test Cases Test Cases	Test Cases     Test Cases       Test Cases     Test Cases       Test Cases     Test Cases       Test Cases     Test Cases       Test Cases     Test Cases	Test Cases       Test Cases       Check the version number of the install file         Test Cases       Test Cases       Check the voltage on pin 5 does not exceed 2.4V         Test Cases       Test Cases       Check how many commands are in the stack	Test Cases       Test Cases       Check the version number of the install file         Test Cases       Test Cases       Check the voltage on pin 5 does not exceed 2.4V         Test Cases       Test Cases       Check how many commands are in the stack         Test Cases       Test Cases       Check user can log into CLI via telnet         ere to check or uncheck all the issues in the list	Test Cases       Test Cases       Check the version number of the install file       Test Cases         Test Cases       Test Cases       Check the voltage on pin 5 does not exceed 2.4V       Test Cases         Test Cases       Test Cases       Check how many commands are in the stack       Test Cases         Test Cases       Test Cases       Check user can log into CLI via telnet       Test Cases         ere to check or uncheck all the issues in the list       Test Cases       Test Cases

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.

		ist Report		Refre	esh Update Issues	Return Print Pag
						Records 1 to 5 of
latus - One	AND Busine	ese lea = Bugs AND A	ecianad To - Dill	Smith		
		-	ssigned to = bit.	Suitu		
epared by	Bill Smith on	arch 9, 2006				
	K					
	TD #	Business Area	Title			Days Open
	Priority	Customer	Status	Product	Module	Assigned To
View Edit	10454	Bugs	After rebooting	the processor, the screen v	will show a wrong module	7
	P 1		Open	Tracker Enterprise	GUI	Bill Smith
View Edit	10373	Bugs	Notifications are	e not sent upon submission.		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" butt	on is broken	405
	P 3		Open	Tracker	GUI	Bill Smith
View Edit	10226	Bugs	Provision of TN	CP problem		406
	P 1		Open	Tracker		Bill Smith
						Records 1 to 5 of
				Refre	esh Update Issues	Return Print Page

**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	•
elp	Sign Off	* Select a report *		-
		Exti	raView Home	_
ation	Need N	lore?		
- Contraction	• Onl • Cor	utions & configurations with the product tours on tact ExtraView Corport & upgrade prices of the product of the	poration	
tatuses			es by Priority	
2	New 200	200		

If you are using the workspace interface, you access your personal options from the Home Menu:

LOGO	V 🕀 🔍 📼 💣	?
ExtraView Report		
Create New Re	Account: Bill Smith	
🚺 New columr	Administrator	<b>**</b>
QA List - Fixed De	Bugs	
Ordered by Priority	Search for ID #	
	Workspace Manager	To • Tr
View Edit QE	Tile Open Panels	ne
View Edit QE	Cascade Open Panels	Us
View Edit QE	Close / Restore Panels	ď
View Edit QE	Toggle Workspace Navigation Bar	Pro
View Edit QE	Close Workspace	l ha
View Edit QE	About ExtraView	<u>15</u> T
View Edit QE	and a solution	Thi
		1 martine

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)

ONAL INFORMAT	TION PERSONAL OPTIONS	REPORT OPTIONS	NOTIFICATION OF	TIONS		
User Informati	00		ecurity Information			1
User ID ?			Enabled User ?			
First name ?	Jimmy					1
Last name ?	Duncan		Expiry Interval ? 0			
Password ?	••••••		pire password now ?			
Verify password ?	•••••	Ð	pire password date ?		Ħ	
Email address ?	jimmy@xxx.com					_
		[	efault Business Are	a & Project		
Company name ?	Superior Software Corp	Q	hotograph ?			
Address ?	269 Mount Hermon Road			1		
			Upload			
City ?	Scotts Valley		Delete	AND THE		
State / Province ?			Jeiete	A.S.D.		
Zip / Postal code ?				N TELX	and and a second se	
Country ?		S	ignature ?			1
	(831) 461-7100		Upload			
	(831) 461-7100		Delete	My Sigi	nature	
	(831) 461-7100			- +		
	(831) 461-7100					
Pager ?	(831) 461-7100					

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.
  - You can set the default workspace to be loaded when you first enter the workspace feature
  - You can also 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
  - 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.

Update User	Cancel	Print Page		C	hange user's details: I	BSMITH (Enabled)
BASIC INFO	PMATION	PERSON	AL OPTIONS	REPORT OPTIONS	NOTIFICATION OPTIONS	PRIVACY GROUPS
DASIC INI C	MMATION	TERSON		KEI OKI OI HONS	NOTIFICATION OF HONS	TRIVACT OROOT 5
	Text s	ize ? Med	ium 💌			
	Langua	ige 🕐 Engl	ish(United Stat	es) 💌		
	Time zo	ne ? (GM	T -8:00) Americ	ca/Los_Angeles	•	
	Date form	nat 🕐 Cust	om date mask		•	
Cust	tom date m	ask 🕐 MM/d	dd/yyyy			
Time in	24 hour for	mat 🥐 🛇 Ye	es 🔍 No			
Chart / P	DF output f	ont ? Luci	da Sans	•		
	Start pa	ige 🕐 Hom	ie Page	•		
Works	bace Set	tings				
Defau	ult Workspa	ice 🕐 Bugi	s Workspace	•		
Drilldowr	n from Repo	rts 🥐 🔘 Re	euse the same	workspace panel	reate new workspace panels	
Auto-se	croll to Pan	els ァ 🔿 Ye	es 🔍 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	s 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	pdate User Cancel Print Page Change user's details: BSMITH (Enabled)			
Personal Details Personal Options	Reports Notification Options User Roles/Security Privacy Groups			
Receive notifications at your primary of address Receive notifications at alternative of address Alternative email address Receive notification on own updates Email format Interest Lists	email  Yes  No email  Yes  No			
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 - ExtraView - Microsoft Internet Explorer 📃 🗖 🔀				
				<u>^</u>
Lookup User Account Directory	Search for Account	Clear Form	Cancel Print Pag	ge
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.				
Directory Search				
Last Name				
First Name				
User ID				
Sort By Last Name				
Search Results				
There are no results to display at this time. Please enter your search criteria and press the 'Search for Account' button.				
	Search for Account	Clear Form	Cancel Print Pag	ge
	,		nn	~
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**

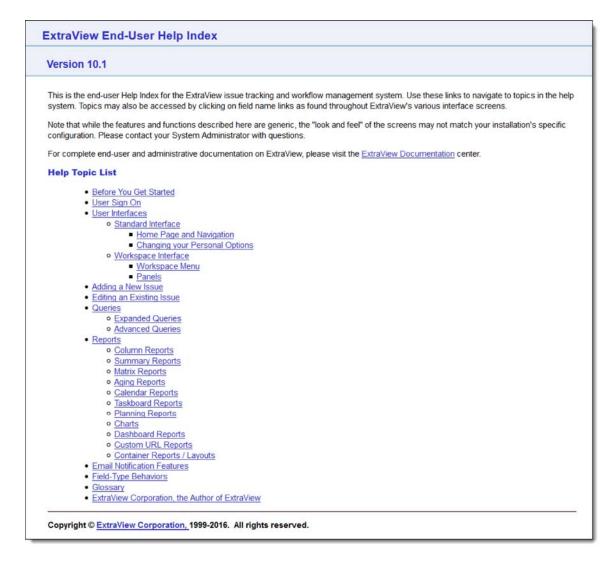
Occasionally, you may need to look up a list for a value, but find that several entries match the search. For example, there may be more than one John Smith in an organization. Ambiguous names may also occur if you only enter a partial name in a field, and then try to insert or update the record. The 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:

Click on the	ne or user ID in the field named Assigned To is ambig name of the user ID you want to select. biguous Hames	uously defined.
User ID	User name	
GREG	Greg Goldberg	
IT	George Miller	

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	РМ
Н	Hour in day (0 - 23)	НН	24
k	Hour in day (1-24)	kk	24
K	Hour in am/pm (0 - 11)	KK	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)	Ζ	Pacific Standard Time; PST; GMT- 08:00
Ζ	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 an editor for HTML, allowing you to enter rich text or HTML without knowing the HTML code set. It offers many features similar to a word processor, and allows you to switch to directly edit HTML.

Your administrator will have selected one of three available toolbars or might have customized a toolbar solely for your company's use. These are shown in the following screenshots. 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.

### **Basic Toolbar**

B I U Ix 1= := @ @ 1

### **Standard Toolbar**

Source 🖨 🐰	6 f u + >	Styles •	Format +	Font •	Size • A· O·
B I <u>U</u> <del>S</del> ×₂	x <sup>2</sup>   <u>I</u> <sub>x</sub> ]	E 99 BK E	2 3 8	•	Ω 🗄 🖶 😇 Ω 🤇

### **Full Toolbar**

🕑 Source   🗟 🝙   🖹 🐰 🖒	Î Î Î Î	X <sub>e</sub> X <sup>e</sup> <u>I</u> x
]= :=   == ==   99 K   E =		
Styles - Format - Font	• Size • 🛕 🗛 📾 🐑 🍽 🔀 🗊	

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	sic Standard Full Button Function		Function	
$\checkmark$	$\checkmark$	$\checkmark$	В	Toggle bold on and off for the selected text

Basic	Standard	Full	Button	Function
$\checkmark$	$\checkmark$	$\checkmark$	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
$\checkmark$	$\checkmark$	$\checkmark$	8	Add a link to the selected text
$\checkmark$	$\checkmark$	$\checkmark$	ę	Remove the link from the selected text
$\checkmark$	$\checkmark$	$\checkmark$	ā	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
	$\checkmark$	$\checkmark$	ĥ	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
	$\checkmark$	$\checkmark$	<b></b>	Undo the last operation
	$\checkmark$	$\checkmark$	*	Redo the last operation that was undone
	√	$\checkmark$	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
	√	$\checkmark$	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

Basic	Standard	Full	Button	Function
				browser, or computer operating system may not support the combination you choose
	$\checkmark$	~	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
	$\checkmark$	~	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
	$\checkmark$	$\checkmark$	Α	Set a color for the selected text
	$\checkmark$	$\checkmark$	A	Set a background color for the selected text
	$\checkmark$	$\checkmark$	53	Mximize / Restore the size of the HTML Area within the browser
	$\checkmark$	$\checkmark$	<del>\$</del>	Strikeout the selected text
	$\checkmark$	$\checkmark$	×	Subscript the selected text
	$\checkmark$	$\checkmark$	ײ	Superscript the selected text
	$\checkmark$	$\checkmark$		Outdent the selected text
	$\checkmark$	$\checkmark$		Indent the selected text
	$\checkmark$	$\checkmark$	99	Place the selected text in blockquotes
	$\checkmark$	$\checkmark$	Se	Place the selected text in an HTML DIV
	$\checkmark$	$\checkmark$		Left-justify the selected text
	$\checkmark$	$\checkmark$	Ē	Center-justify the selected text
	$\checkmark$	$\checkmark$	II	Right-justify the selected text
	$\checkmark$	$\checkmark$		Full-justify the selected text
	$\checkmark$	$\checkmark$		Insert an HTML text anchor tag
	$\checkmark$	$\checkmark$	X	Insert an image
	$\checkmark$	$\checkmark$	Ħ	Insert a table

Basic	Standard	Full	Button	Function
	$\checkmark$	$\checkmark$		Insert a horizontal rule
	$\checkmark$	$\checkmark$		Insert a smiley face
	$\checkmark$	$\checkmark$	Ω	Insert a character symbol
	$\checkmark$	$\checkmark$	$\bigcirc$	Insert an HTML Iframe
		$\checkmark$	Q	Search for text within the HTML Area field
		$\checkmark$	54 14	Search and replace text within the HTML Area field
		$\checkmark$		Select all the text within the HTML Area field
		$\checkmark$	₽¶	Text direction goes from left-to-right (the default)
		$\checkmark$	٩ı	Text direction goes from right-to-left
		$\checkmark$	Ĭ	Insert a page-break for printing