

If you are new to Issuetrak, some of the verbiage used to describe objects may be overwhelming or in some cases may mean different things to different people. This document will give you a repository of the major terms used within Issuetrak. We'll start with the most basic terms and work through the more advanced ones.

- **Issue** – generic term that describes a unit of work in Issuetrak. The label for this may be changed in your site, so it appears as Item, Work Order, Request, Ticket, Complaint, etc.

users and groups

- **User** – a record associated to anyone who sends an email, receives an email, or logs into Issuetrak. It stores contact details, as well as permissions that determine access level within Issuetrak. Each record has a field to store “record type” and “user type.”
- **Record Type**
 - **User** – has a role in the site or on the issue. They may also access issues through reports or searches. Can log in, send, or receive email from Issuetrak.
 - **Template** – a record used only to create other users. Not an active user account, these records have no access to the site and perform no role on the issue. Provides sample information and permissions to a user-type record.
- **User Type**
 - **End User** – a user in Issuetrak with no agent-level permissions. May be granted access to log in, or may simply send and receive emails.
 - **Agent** – a user with any one of the following permissions:
 - Can assign or be assigned primary issue ownership
 - Can assign or be assigned Next Action secondary ownership
 - Can submit issues on behalf of others
 - Can perform administrative actions within the siteThe number of Agents allowed in your system is controlled by your software license key.
- **User Roles** – define the relationship between the user and the issues.
 - **Enterer** – Person logging the issue
 - **Submitter** – Person with the problem that the issue is created on behalf of
 - **Assignee** – Agent user or Group that is the owner of the issue
 - **Next Action** – Agent User or Group assigned secondary ownership
 - **Task Assignee** – User or Group assigned to a step within a process on an issue



- **Group** – a collection of users for a purpose. Each group is assigned a type that determines who can be added to the group. Groups have four main functions within Issuetrak:
 - **Permission inheritance** – all the members of the group inherit the permissions of the group
 - **Assignment** – used when you want to associate the assignment, next action, or tasks to multiple users
 - **Restriction** – values such as issue Types, Knowledge Base articles, Quick Picks, and Task Groups may be restricted to only the members of the group
 - **Email** – if you need to email issues or Knowledge Base articles to multiple people, you can send it to the group
- **Group Membership Type**
 - **Any** – there is no restriction on what users may belong to this group. Agent-level permissions are unavailable to be selected.
 - **Agent** – only users designated as agents may belong to this group. This group is allowed access to agent-level permissions, and any agent added to that group inherits those permissions.
- **Permissions** – controls what each user can do within Issuetrak. Granted at the user level and/or through Group membership.
- **Parameters** – settings on the user record that determine record attributes.
 - **Active** – may be used to report and respond to issues. Users without this checked are no longer able to be used in the site but are maintained for historical purposes.
 - **Can Log In** – Users may fully use the web site and view information. Users who are active but cannot login can be used as submitters on issues.
 - **Sys Admin** – this parameter can be granted only to Agents by another user with this parameter. This grants full control and an unlimited view of the site. They are the only users that can make modifications to the System Settings sections of Issuetrak.
 - **Show Debug** – use only when directed by Issuetrak’s Support Team. It displays information needed for troubleshooting.
 - **No AD Authentication** – when the Active Directory module is enabled, this controls whether the user record will be authenticated and updated by Active Directory.
 - **Suppress All Email** – turns off all mail going to this user from Issuetrak.

building blocks

- **Organizations** – structural container for holding users, issues, and assets. Organizations can be used to control visibility of issues and users in Issuetrak. These containers normally represent companies you support or need to interact with Issuetrak.
 - **Internal Organizations** – If marked on the organization record, members of the organization are restricted to only view users and issues submitted from their organization. Access may be amended by using Additional Organizations.



- **Additional Organizations** – Creates a parent/child relationship between organizations. The additional organization's issues and users are then allowed to be seen by users in the parent organization.
- **Departments** – an optional structural container associated with users, issues, and assets. Can be used to control visibility of issues and users in Issuetrak. Provides reporting capabilities, but does not appear as a value on issues. They normally represent a business department.
 - **Internal Departments** – if marked on the department record, members of the department can only view users and issues from their department. Whether the restriction is based on issues assigned to or submitted by users in their department is determined by the "Limit to..." setting in the System Settings.
 - **Responsible Departments** – allows an issue to be associated with a named department. It overrides the normal view of the issue by department and creates another reporting variable.
- **Locations** – an optional structural element that can be associated to a user and displays as a value on the issue. Is not involved in determining issue visibility. Typically represents offices or buildings associated with your company.
 - **Regions** – Structural element tied directly to Locations. Can be used for reporting, but does not appear on the issue record.

issues – standard features

- **Types** – the classification of an issue for reporting. Required to be associated at the submission of all issues. Types also determine which custom screen is used. Subtypes may be enabled to allow greater granularity.
 - **Trak Tips** – a message that may be displayed to users based on selection of a type or subtype on the issue.
 - **Subtypes** – optional levels of classification going beyond issue types. There are four levels available that create a hierarchical structure with issue types.
- **Custom Screens** – feature that determines the order the issue fields display. This can be adjusted by administrators to change which fields are displayed and required. Custom screens are assigned to issue types, so the number of custom screens can never exceed the number of issue types. Selecting the type on the issue loads the appropriate custom screen.
 - **Screen Text** – customizable text positioned on the custom screen.
 - **Section Headers** – customizable headers that divide sections of your custom screen.
- **Quick Pick** – a template used for submission of issues that allows for field values, individual tasks, or task groups to be pre-populated. Access to quick picks is determined by permission and whether any group or organization restrictions have been established.
- **Priority** – value representing the urgency of an issue. May be selected by any user with a role on the issue and the permission to select priority. A default priority can be set at a system level to apply to newly submitted issues when the submitter doesn't have the permission to change it.

issues – optional features



- **Attachments** – when enabled, allows files to be linked to issues, assets, users, and Knowledge Base articles. Any type of file may be attached and there is no restriction on the number of files that may be attached to a particular item.
- **Causes** – a dropdown field to capture the reason why the issue occurred.
- **Classes** – allows a broad categorization of issues that can be filtered on the dashboard and in reports.
- **Solutions** – a field filled out during issue closure that describes how the issue was resolved. Allows administrators to create a drop down list of pre-filled values to handle repetitive resolutions.
- **Substatus** – value representing stages in the issue lifecycle.
- **User Defined Fields** – fields within Issuetrak set up by administrators specific to their needs. There is no limit to the number of fields available to be created. Field types include text, large text, drop down lists, yes/no, integer, number, and date fields.

workflow

- **Task** – a single item of work that needs to be completed before the issue can be closed. Tasks can be assigned to a user or group. Each task can either be marked when complete or can have a Yes/No/NA response.
- **Task Group** – a defined collection of tasks that may be added to an issue or triggered in response to another Yes/No/NA task.
- **Process** – a list of tasks that need to be completed to close the issue.
- **Workflow** – a process that may include decision-based branching that changes the currently available list of tasks.
- **Task Manager** – the engine that allows you to build individual tasks or add task groups to an issue. It is used to build all workflows and processes in Issuetrak.

business rules

- **Auto Assignment** – allows you to assign an issue based on predefined conditions.
- **Escalation Rules** – allows you to build rules that modify an issue or email users based on criteria on the issue record. Escalation Rules operate by what time the issue was submitted or how long the issue has been idle.
 - **Last Activity** – the last time the issue was edited and saved to change a value, or when a task was marked as completed, or a note added.
 - **Process Order** – the order that the rules are applied to the issue.
- **Substatus Rules** – Ability to change substatus values from one to another by an event occurring on the issue. Also used to pause the system clock on an issue.



additional capabilities

standard features

- **Calendar** – enabled users may create events and reminders. Agent users may also create Out-of-Office events to control routing of issue assignment and notifications to another agent.
- **Global Issues** – issues that are linked together to work as a collective unit. Can be configured to update values on the linked issues from the global issue when the initial link occurs or to cascade ongoing changes made to the global issue to the linked issues.
- **Incoming Email** – a processor that converts email into new issues. Replies to system generated notifications can update issues with notes and field value changes determined by tokens.
 - **Email Tokens** – a combination of text and tags that instruct specific values to be associated to fields within an issue.
 - **Blocked Attachments** – a feature within Incoming Email that allows specific attachments to be blocked from future processing (e.g., social media icons or company logos).
- **Issue Audits** – captures detailed changes made to the issues, such as who changed a value, when they changed it, and what the original value was. May be viewed from either the issue or from the administration menu.
- **Knowledge Base** – a container that allows for the creation of searchable content in article format. Each article may be associated with a category or subcategory. Articles may be public or viewable only by those with the appropriate permission. Categories or individual articles may also be restricted by group or organization membership.
- **Projects** – allows issues to be associated to a particular project ID. Projects may have associated hours, dollars, categories, and substatus. Dashboard reporting is available by Project and Project Category.
- **Recurring Issues** – pre-filled issue template that submits issues automatically on a defined schedule.
- **Service Level Agreements** – used if you are required to respond to and/or resolve issues in a certain timeframe. They can be based on either who submits the issue or who the issue is assigned to.
 - **Response Time** – allowed time for someone other than the issue submitter to add a public note in reply to the issue.
 - **Resolution Time** – allowed time to close the issue.
 - **Severity** – rates the issue's impact to the organization. By using the link to service levels and associated agreements, ultimately determines required issue response and resolution times.



- **Service Level** – set of terms defining applicable days and time, response and resolution times specific to each severity.
- **Agreement** – applies a service level and a default severity to an issue. Associated by organization, group, or asset.
- **In Compliance** – issue responded to within response time and closed within resolution time.
- **Out of Compliance** – issue not responded to within response time or closed after allowed resolution time.

add on functionality

- **Active Directory** – Allows for importing and updating of users from Microsoft Active Directory into Issuetrak. Controls user authentication on login.
- **API** – Application Programming Interface that allows external systems to integrate with Issuetrak. Its capabilities allow for adding, editing, and deleting issues.
- **Asset Management** – Allows you to enter, track, and manage assets. They may be associated with issues for reporting.
 - **Asset** – A record, thing, or entity with value to an organization. An asset can be linked to a User, Organization, Department, Location, or issue for combined reporting.
 - **TrakPC/ScanPC** - Issuetrak's proprietary application used to scan and audit Windows-based computers. Used to populate and update PC Assets.
- **Billing** – Allows for the association of multiple line items to an issue to provide hourly and materials rate information.
 - **Products/Services** – A service charged as a set value or hourly rate, or a billed material.
 - **Work Order** – Billing and materials line items that may be printed and verified but aren't yet invoiced to the customer.
 - **Invoice** – A work order that has been converted into a billing statement or exported to be used with an external accounting program.
- **Surveys** – Questionnaires that can be sent manually or automatically to measure quality of service or gather information.
- **Chat** – An integration that provides a support channel within your Issuetrak site. Based on configuration, a floating button can appear, allowing visitors to initiate a chat session with chat agents.
 - **Chat Agents** – Users that have been given access to receive and respond to incoming chat messages.
 - **Widgets** – The interface that visitors use to initiate chat sessions with chat agents. Multiple widgets can be configured, with different options and chat agent assignments.
 - **Chat Widget ID** – Obtained from the Settings section of the Admin Portal; required to have the chat widget appear on your Issuetrak site.
 - **Chat Portal** – Where agents log into to see incoming chats, previous chats, and stats about availability, etc.

- **Admin Portal** – The page where admins can adjust various aspects of their Chat Widgets and Chat Agents.

reporting

basic terms

- **Field** – A piece of information stored within Issuetrak. It could be data from an issue, user, asset, etc.
- **Record** – A collection of fields. Each record displays as one row. A record can be an issue, a user, an asset, a task, or any other item that you need to report on with your selected fields displayed.
- **Table** – A collection of records containing similar data, such as the Organization Table or User Table.
- **Dataset** – A collection of multiple fields from related tables selectable for reporting purposes. For example, to report on User information, selecting the Users dataset pulls fields from the Users, Organizations, Departments, and Locations tables.
- **Total Time Open** – A calculated value that represents the time elapsed from the Entered On Date/Time to the Closed Date/Time for closed issues. Open issues use the run time of the query or the report instead of the Close Date Time for the calculation
- **Adjusted Time Open** – Adjusts the Total Time Open when certain conditions apply. First the optional feature substatus must be enabled. Second, a substatus value must be set to pause the issue time in the Issuetrak Business Rules. Paused Time is the total time an issue uses a paused time substatus. Total Time Open minus Paused Time results in Adjusted Time Open.

reporting tools

- **Saved Searches** – An option allowing a user to save the current search criteria to be used again in future. Output options allow for multiple formats, and sorting may be done on up to three columns. May also be used to create scheduled reports.
- **Summary Reports** – Pre-formatted reports that summarize data over a selected time.
- **Report Writer Query Builder** – Allows you to select a dataset, create a filter, determine the fields that you would like in your output. Each query may be used to build multiple reports.
- **Report Writer Report Builder** – Allows for formatting a Report Writer Query into a recognizable report that can be grouped, ordered, and totaled for presentation. May be viewed within Issuetrak or exported to Excel.
- **Scheduled Reports** – Ability to schedule Report Writer Reports and Saved Searches. Reports may be emailed to designated Issuetrak users for filtered reports based on permissions or to non-user email addresses for unfiltered reports.



- **Google Analytics** – Allows integration between an Issuetrak site and Google Analytics. This leverages a free set of digital analytics tools from Google that can assist you in gaining a deeper understanding of the customer experience on your site.
 - **Analytics ID** – Obtained via your Google Analytics portal and required for Issuetrak to provide data to your Analytics account.

