Systems Management Development Centre

JADECare Tracker
Installation and Administration Guide

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1. Introduction

1.1. JADECare Tracker

The JADECare Tracker application is built on top of the JADECare Systems Manager database and has interfaces with the JADECare Systems Manager.

It is a customer and service orientated system and is used to log all calls, faults, queries and suggestions from clients. Each call has an assignee responsible for the call at any stage while it is open. Further, there is a comprehensive escalation suite that can be implemented to ensure that appropriate personnel are notified of the status of a call.

2. Installation and Configuration

2.1. Conventions

2.1.1. Customer Id

The JADE Systems Manager is designed to support JADE systems managed for multiple customers. Customers are defined in the **Customer** class in the JSM database. The primary key to collections of customers is the three-character customer id.

2.1.2. Environment Id

Each managed JADE database is referred to as a **host environment**, i.e. an instance of an **environment**, running on a host machine. An environment may exist on more than one machine i.e. the same JADE application software may be running in multiple databases on multiple hosts. The environment identifier must be formed according to the following standards:

- 3 characters customer id
- Up to 6 characters free format
- Max 9 characters

Suggested standard **CCCPXXXXX,** where

    CCC = Customer Id

    P = Production, **U** = UAT, **D** = Development, **T** = Test

    XXXXX = Application identifier

    Examples : **TMPUCASTL, TMPPCASTL**

Environment id **must** include the string "**joss**" for JSM and "**karma**" for JSA.

2.2. Installing JADECare Tracker

Refer to document '**JADECare Tracker setup notes**'.

3. JADE Initialization File

3.1. Overview

JADECare Tracker uses the same database initialization file as JADECare Systems Manager (JSM). This file must reside in the **c_bin** directory and is to be be titled **<environment>.ini** where <environment> is the environment name.

The following descriptions only cover those initialization file options that are unique to Tracker. Tracker also uses many of the standard CardSchema options that apply to all applications that run as subschemas of CardSchema. For information about CardSchema initialization file options, please refer to the Appendix in the **CardSchema User Guide**.

You will see the terms KARMA and JOSS used in various places. These were code names used during early JSM development. JOSS was an acronym for JADE Operations Support System, and KARMA an acronym for Kernel And Remote Management Agent.

3.2.   [Karma] Section

3.2.1. ClassesUsingLDAP

No longer used, applied to release 3.0 and earlier.

3.2.2. MasterCustomerId

This is a three-character identifier for the master customer i.e. the system manager.

Default=**CNW**

3.2.3. MasterCustomerName

This is a descriptive value used to identify the master customer in a number of displayed messages, reports etc. Maximum 30 characters.

Default=**JADE Direct**

3.2.4. UseLDAPService

Default = false

Identifies whether staff and roles details are to be obtained against an LDAP service.

3.3.   [PagingGateway] Section

3.3.1. PagerServer

Identifies the server hosting the Paging Gateway system. This is required for any paging activity implemented by JSM and/or Tracker.

3.4.   [LDAP] Section

3.4.1. LDAPServer

Identifies the server hosting the LDAP service. This is required if the **Karma** section has **UseLDAPService** defined as true.

There is no default value.

3.5.   [Tracker] Section

3.5.1. AttachmentDir

Default : <env>\server\c_misc\Tracker Attachments

Identifies the directory where Tracker attachments are to be reside.

3.5.2. EmailAddress

Default : uses JSM 'send from e-mail address' entered via System Global Options on Misc sheet.

Applications requiring a from address must locate a from address at start up and determine it to be valid, otherwise the application will generate an alert, log the error and terminate.

If not declared or keyword of <default> is used, then the address defaults to using the JSM email address declared in the System Global Options form in the Misc sheet.

3.6.   [TrackerWebService] Section

For use solely by JADECare 24.

This section is only required if the Tracker to PARSYS web service is required.

Refer to section **Tracker Web Service** below for more detail.

3.6.1. SSLSocketOnly

Values : true or false

Default : false

Setting this value to true will cause any requests using the http protocol to be rejected.

The value of false will allow both http and https protocols to access the web service.

3.6.2. RestrictAccessTo<n>

Values <hostname>

This item is optional. If one or more entries are defined using this construct, then access is restricted to requests originating from the host names listed.

The use of the ? character to signify any character in this position may be used in defining the hostname but may only be used once per restriction entity.

4.   Functionality

4.1.   Tracker Services

A Tracker service is an entity associated with a service being provided to a customer. Within Tracker, this is a unique (within customer) 60-character name identifying the service. Within this service there may also be sub-items defined known as service components.

For example.

A managed JADE host environment equates to a Tracker service and each of the applications registered and monitored by the host environment equates to a service component within that service.

JADE Environment is called **TMPUCASTL** and resides on a cluster host called **TMPABCC1** and this JADE Environment has executed and registered two applications called **ATestApplication** and **AnotherTestApplication**.

The JADE Environment would correlate to a Tracker service called **TMPUCASTL on TMPABCC1** and the applications would correlate to service components called **Application ATestApplication** and **Application AnotherTestApplication** respectively.

A Tracker service is the entity that call escalation is defined against and what specific Service Level Agreements are defined for.

A background task, **ScmBackground**, is executed to automatically generate some Tracker services depending on JSM activities.

When a customer is first created via JSM or Tracker, a background task detects this change and immediately creates 3 default Tracker services:

- **All Unspecified Items**
  A general area to be used if no specific Tracker service can be identified.

- **Hardware Items**
  Any server hosts and/or machines defined in JSM will be listed as service components within this service.

- **Network Items**
  Any customer having a service relationship with us will usually have one or more network requirements.

When a server host or machine is registered for a customer, a background task automatically creates a service component with the parent service being **Hardware Items**.

When a JADE host environment is registered within JSM, the background task generates a Tracker service for the environment with the service name being **<environment name> of <serverhost short name>**.

When a new JADE application is registered for a JADE host environment, the background task generates a new service component **Application <application name>** for the service **<environment name> of <serverhost short name>**.

4.2.   Quick Name Search for Contact or Assignee

Many of the forms in Tracker require the entry of either a contact or assignee entity.

While these entries can be selected from a drop down list or by the definition of the operator or role user code (for example usercode tmpmfj1) there is also a quick search function.

This is activated by entering the equal sign (=) and as much of the first and/or last name as required. Note that this search is case-insensitive.

Example 1:

Entering '=mar' by itself will provide a list of all users where the first or last name starts with 'mar' and all roles that start with 'mar'

Depending on the entries in JSM, the list presented may contain 'Martin Someone', 'Martin Evermore', 'David Martin', 'Marsha Easton', "Elliot Martin' and 'Martin Enterprises Development Group'
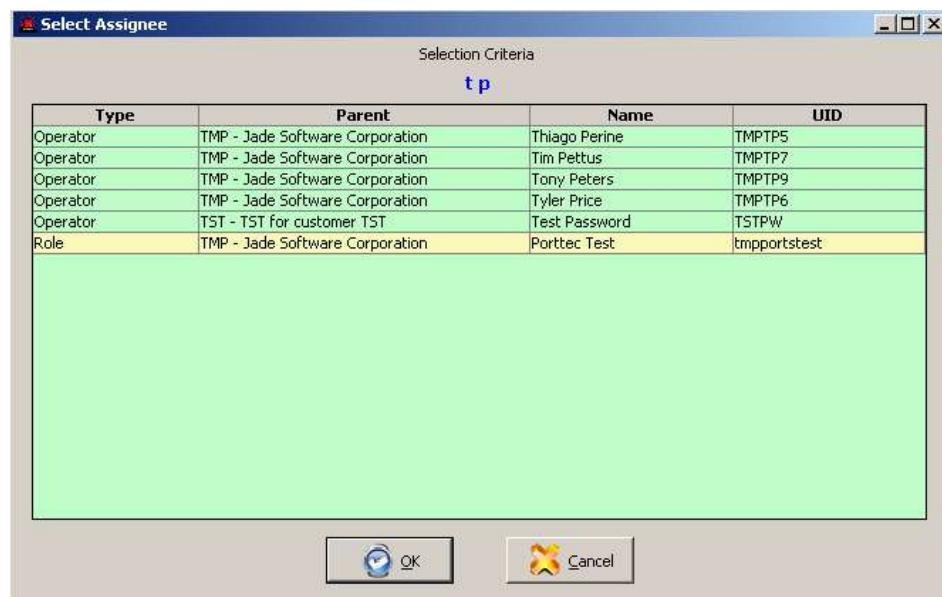
Example 2:

Entering '=mar e' where the 2 parts are separated by a space will provide a smaller list where the first name must start with 'mar' and the last name must start with 'e' **or** the last name starts with 'mar' and the first name starts with 'e' and similarly with the role entity.

Depending on the entries in JSM, the list presented would now contain 'Martin Evermore', 'Marsha Easton', "Elliot Martin' and 'Martin Enterprises Development Group'

If only one entity is found from the quick name search, the combo box concerned is updated with the value.

If more than one entity is found from the quick name search then the following dialog is displayed and by double-clicking of the required row, the entity concerned is propagated into the combo box concerned.

Type	Parent	Name	UID
Operator	TMP - Jade Software Corporation	Thiago Perine	TMPTP5
Operator	TMP - Jade Software Corporation	Tim Pettus	TMPTP7
Operator	TMP - Jade Software Corporation	Tony Peters	TMPTP9
Operator	TMP - Jade Software Corporation	Tyler Price	TMPTP6
Operator	TST - TST for customer TST	Test Password	TSTPW
Role	TMP - Jade Software Corporation	Porttec Test	tmpportstest

Select Assignee — Selection Criteria: **t p** — OK — Cancel

The rows shown in yellow are Tracker role entities and are a quick visual aid to highlight the different entries defined in Type.

4.3. Call Form

4.3.1. Call Changes

A call update will usually require text to be entered in the Call Details tab. However, if changes are made to the key items or attachments added or deleted, then if no call details are added, the changes are made and specifically stated in the call history generated.

4.3.2. Call Closure.

When updating the call, call details will always be required. However, when the call is being closed, then the text '>>> Call closed. <<<' is automatically entered on the user's behalf.

4.3.3. Call Priority.

Call priority may be any of A, B, or C. For those staff belonging to the supplier of the Tracker service (aka master customer), these staff are also known as internal staff, then they may also assign a Priority of I which signifies Internal Use Only.

Any Tracker calls with a priority of I is only visible to internal staff and escalation is also limited to internal staff.

Note that escalation defining a priority of Any will include priority I but not specific escalation can be defined for priority of I.

The only way that information from such a Tracker call will be visible to the external users would be when:

- If a manual email is generated from the Tracker call

- If the Tracker call priority is changed from I to either A, B or C

4.3.4. Email Acknowledgement

Being able to declare the call source as Email is restricted to Super User roles only as the email acknowledgement message uses the ini file declared OperationsRoleId to obtain the role and uses the role and customer details to build the "signature" portion of the email issued.

When the call source is specified as being from Email and the call is being initiated, a dialog is provided to allow an email acknowledgement to be sent.

This dialog provides:

- Modify, add or replace the email address

- Ok to issue the acknowledgement or Cancel to not issue and to continue with call update.

The email address will be obtained from the contact specified if this is an operator, role or third party and has an email address, otherwise you will be asked to provide the email address (or addresses). Note: the email string can be multiple addresses using the comma (,) or semi-colon (;) as delimiters.

An example of the acknowledgement is shown below

Your email request has been received and a Tracker call has been created.

The Tracker call reference is : 183

Please quote this number when communicating with the Help Desk

Help Desk
HelpDesk@customer.com

Jade Software Corporation
P.O. Box 20-152
Burnside
Christchurch, NEW ZEALAND
Phone 0800 65 2266

NOTE : this message was auto-generated by JADECare Tracker and should not be replied to.

4.3.5. Outage

The outage field allows the user to enter a specific date and time that an outage occurred. Outage information is reflected in red text in the call history.

4.3.6. Action By

Action-By is enabled by selecting either 'Alert' or 'Email' entries from the drop-down combo box and inserting a date and time. Calls containing an action-by date and time are visible in the 'Action By' column of form tables. 15 minutes before the action-by time has expired an alert will be raised or an email sent depending on user choice. In addition to this, if the call is shown in a table, the action-by cell colour will change to red for the duration of 30 minutes.

Action-by changes are audited.

4.3.7. Resolution ID

Any input defined here marks the call as resolution pending. The intention is to use this field where a known problem exists for which a hot fix is pending e.g.: version id's and hot fix numbers.

A call marked as resolution pending will still receive automatic updates from unhandled exceptions but notification emails to the assignee will be suppressed on each update.

When closing a call with a resolution id the 'Close Calls for Resolution Id' button becomes available. Clicking this button will close all calls with a matching resolution id for the selected customer.

Resolution id's for calls are displayed in the '**Res Pending**' column of a table.
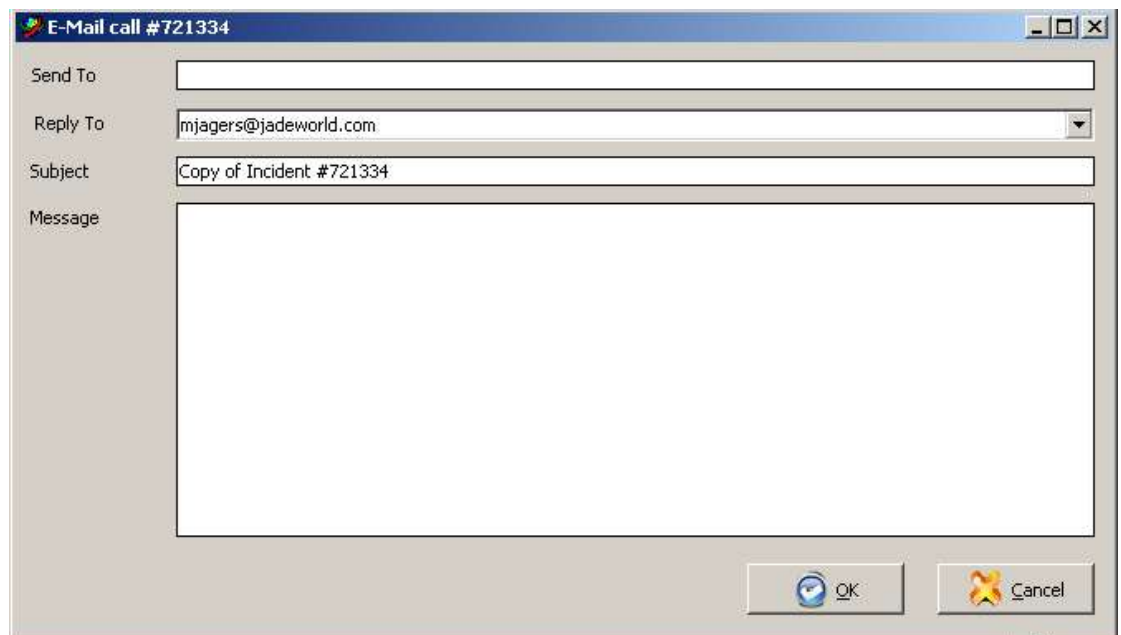
Any change made to a call resolution id is audited.

4.3.8. 'Copy to Clipboard' Button

Use of this button will copy the contents of this call form into the clipboard area such that it can be pasted elsewhere.

4.3.9. 'Email' Button

Use of this button will cause the following form to be displayed.

Send To:

One or more email addresses can be entered in this text box separated by either comma (,) or semi-colon (;).

The entries defined can be full email addresses (format someone@domain.com) or they can be the user ids of operators or roles defined in JSM/Tracker. If the entries are operator or role user ids then these will be expanded into an email address where possible.

Reply To:

This defaults to being the email address of the Tracker logon user code but can be changed to the default Operations Role Id (provided from the ini file)

Subject:

This detail is generated by the system but can be modified as desired by the user.

Message:

A free form area that can be used to precede the call details which will be appended to the email.

When such an email is sent the Tracker call has a history entry created defining that an email was sent and the email addresses derived from the **Send To** field.

4.3.10.   'Quick Print' Button

Provides a facility to quickly print the content of the current call. This will cause a preview of the printed call using the JADE Print Preview form with its various options (viewing of next/previous pages, printing of all or selected pages or cancel).

4.3.11. 'Print & Extract' Button

This button causes the following dialog to be displayed:
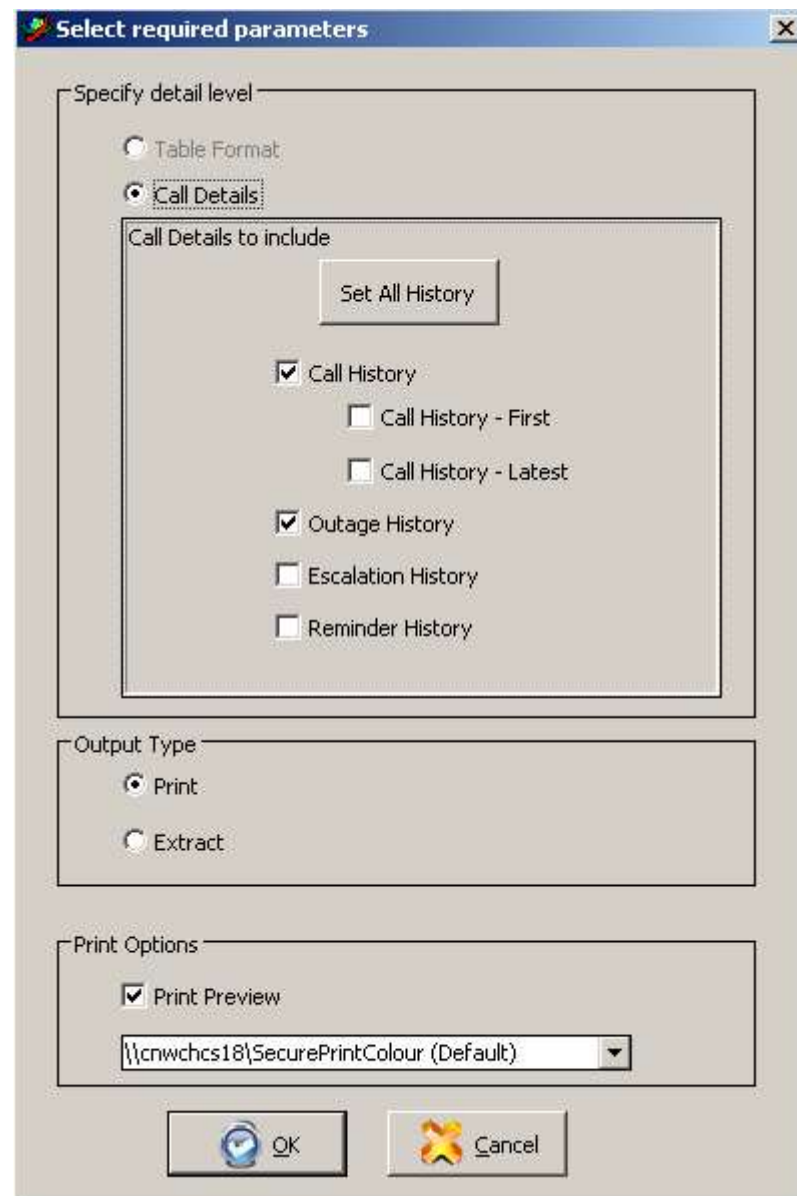
This allows selected parts of the call history or all history to be printed to selected printer or extracted to defined directory and file name.

4.3.12. 'Add To \ Delete From Watched Calls' Button

A Tracker call can be added to or deleted from a Watched list of calls for the logged-on user. If the Tracker call is added to the Watched list then every call summary form will automatically show this call regardless of whether it is assigned to the currently logged-on user or not.

4.3.13. 'Add To \ Delete From Active Calls' Button

A Tracker call can be added to or deleted from an Active call list for the logged-on user. A list of calls that are defined as Active for the currently logged-on user may be viewed via the menu selection View | Calls | Active Calls or using the accelerator key CTRL + A.

Active calls are those calls that a user has currently under action and the list is persisted so that a user may log-off and log-on again later and still be able to view later.

4.3.14. 'Close Calls for Resolution Id' Button

If the Tracker call being viewed is closed and it has a resolution id defined, then this button will allow all other remaining Tracker calls that are open and have the same resolution id defined to be closed with new history entry :

>>> Call closed using resolution id. Closure initiated from call #<nnnn> <<<

4.3.15. Adding Attachments

Attachments can be added in one of two ways:

- Clicking on the 'Attach' button and selecting one or more archive files and/or pdf files.

- 'Drag and Drop' one or more files and/or one or more folders from a Windows Explorer session where the files are an archive type (rar or zip) and/or pdf format.

4.4. Multiple Call Form

This feature is provided so that the user may create multiple calls having the same purpose but a different context. For example, work requests to apply updates to servers at a given CIRC level for different customers.

In the picture below, two calls (one for each selected customer) will be created for deploying some binary file to a customer's servers where those servers are at CIRC 5.

In each generated call, the %customer% text in the description is replaced with the name of the customer. In each call, the %servers% in the call details is replaced with a list of servers at CIRC 5 for that customer.

The originating tracker field indicates a call that describes the overall work request – "deploy some binary file to CIRC 5 servers". This call is updated with a list of the calls generated (two calls in this example). The originating tracker number is also written to the Resolution Id field of each generated call.
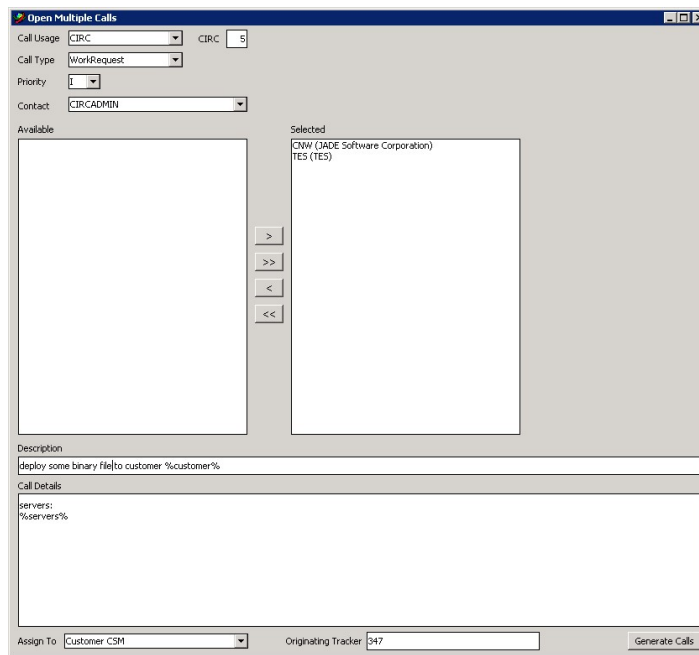
4.5. Absence, Termination or Disabled

4.5.1. Redirection Info

When a person is defined as absent, is marked as disabled or has terminated employment or when a role is marked as disabled, then the call advice (assignment or escalation) may be redirected.

The redirection information is embedded within the email body before the call details.

```
>>>>>>>>>>>>>>>>>> Redirection Information Start <<<<<<<<<<<<<<<<<<<<<<<<<
Intended recipient : Lisa Simpson  (tmplbs6) - Absent from 01 July 2004 to
30 July 2004
Manager : Homer Black  (tmphlb3) - Absent from 08 July 2004 to 15 July 2004
>>>>>>>>>>>>>>>>>> Redirection Information Ends  <<<<<<<<<<<<<<<<<<<<<<<<<
```

In the case above, the intended recipient was absent and their immediate manager was also absent at the time this escalation was invoked. So cnwlbs1 was emailed and the immediate manager of cnwhmb1 was notified of the assignment / escalation.

Should the person or role concerned be disabled (if a person this means they don't exist in LDAP, were explicitly marked as disabled or have terminated from the company), then the following text will be shown.

```
>>>>>>>>>>>>>>>>>> Redirection Information Start <<<<<<<<<<<<<<<<<<<<<<<<<
Intended recipient : Lisa Simpson  (tmplbs6) - Disabled, reason 'Terminated
on 12 July 2004'
Manager : Homer Black  (tmphmb3) - Absent from 08 July 2004 to 15 July 2004
>>>>>>>>>>>>>>>>>> Redirection Information Ends <<<<<<<<<<<<<<<<<<<<<<<<<
```

Should no manager be found, then the redirection will be sent to the Operations Role entity declared in the initialization file, this will be highlighted in a statement just prior to the redirection information.

4.5.2. Call Assignment

When a call assignment is made via the GUI interface (the call form) and the person concerned is absent, then a pop-up dialog will be presented identifying the person is absent and the absence dates and the persons manager (if defined) is also

shown. You then have the option to continue with the assignment or to select another assignee.

When a call assignment is generated programmatically, the assignee is derived.

Should the assignee for a call be absent, then the assignee is sent an email in their absence and the next available manager not absent or disabled is notified using the notification methodology requested when updating the call.

4.5.3. Escalation

Escalation redirection needs to be explicitly defined, the default for redirection being false. This means that if a person is defined as absent, then they will continue to get any escalation notifications in their absence (email or page).

If redirect is specified, then if the intended recipient of escalation is absent, then they will still be notified (by email only) and the next available manager in the management chain will be notified using the methodology defined (email or page).

4.6. Escalation

There is a comprehensive escalation process provided in Tracker. An escalation profile may be defined generically for all calls for a customer with email and paging as notification methodologies, or a profile may be defined at the other extreme by explicitly specifying the customer, service, call type and priority.

For each escalation profile there are seven definition types, as follows.

4.6.1. Definition

Escalation advices may be issued for any of the following events:

Type	Time	Description
On Open	n/a	notify when call is created or re-opened
On Update	n/a	notify when call is updated
On Close	n/a	notify when call is closed
Since Open, Once	Required	notify once only when time specified has elapsed
Since Open, Repeat	Required	notify every <time> elapsed since call was opened / re-opened
Since Update, Once	Required	notify once only if time specified has elapsed since last update
Since Update, Repeat	Required	notify every <time> elapsed since call was last updated

The Type and Time form part of the escalation key.

All escalation profiles belong to a specific customer. A default escalation profile may be defined regardless of service that meets the client's needs, in this case the service would not be defined as the profile would be applicable to any service for which an exact profile match was not found.

However, the majority of escalation profiles would declare a service.

The keys for an escalation profile are:

Customer	The owner
Service	The service contracted for
Call Type	The type of call (Fault, NFS, Generic Call, Query, Work Order, Work Request or Any)
Priority	The call priority (A, B, C, I or any)
Escalation type	see table above
Time	see table above

4.6.2. Granularity

A customer may have escalation profiles defined at a very coarse level of granularity such that any priority call of any type regardless of service will cause escalation.

At the other extreme, a customer may also have escalation defined for an explicit priority, call type and service.

The following identifies the variety of escalation profiles that may be defined and the order of priority accorded to each.

Service	Call Type	Pri
specific	Specific	specific
specific	Specific	Any
specific	Any	specific
specific	Any	Any
Any	Specific	specific
Any	Specific	Any
Any	Any	specific
Any	Any	Any

4.6.3. Applying Multiple Escalation Profiles

Tracker provides two forms to assist in understanding the application of escalation profiles, a narrative of which is given below.

- Escalation Hierarchy provides a list of all escalation profiles defined (by Customer, Service, Call Type and Priority)
- Escalation Scenario provides a form which provides a view of what escalation will be invoked for a call for a specific customer, service, call type and priority.

When a call is created, one or more escalation profiles may be applicable to the call, this being dependent on the customer, service declared, call type and priority.

For example, a customer may have the following escalation profiles defined:

No	Service	Call Type	Pri	Person	Type
1	Paging Gateway	Fault	A	cnwsas1	On Open, email
2	SCMS	Fault	A	cnwmfj1 cnwsas1	On Open, page On Open, page
3	Any	Fault	A	cnwmfj1 cnwsrb1	On Open, email On Open, page
4	Any	Any	Any	cnwmfj1 cnwabc1	Since Update, email On Open, email

Using the above table, if a priority A fault is opened for service SCMS, then the escalation profiles above that apply to this call will be profiles 2, 3 and 4.

Each of the profile parameters for 2, 3 and 4 are then examined and specific parameters are created for each call. If a person is defined in more than one escalation profile, then the most significant escalation profile for that person will override any other definition.

Using the above table, then the call opened for a priority A call on service SCMS will invoke the following escalation:

- cnwmfj1 will be paged (most significant escalation profile for cnwmfj1 is profile #2 which overrides cnwmfj1 declarations in profiles #3 and #4)

- cnwsrb1 will be paged

- cnwabc1 will be emailed

4.6.4. Escalation Redirection on Absence or Termination

Refer to section **4.1 Absence, Termination or Disabled** above for further details.

4.6.5. Escalation Hierarchy Form
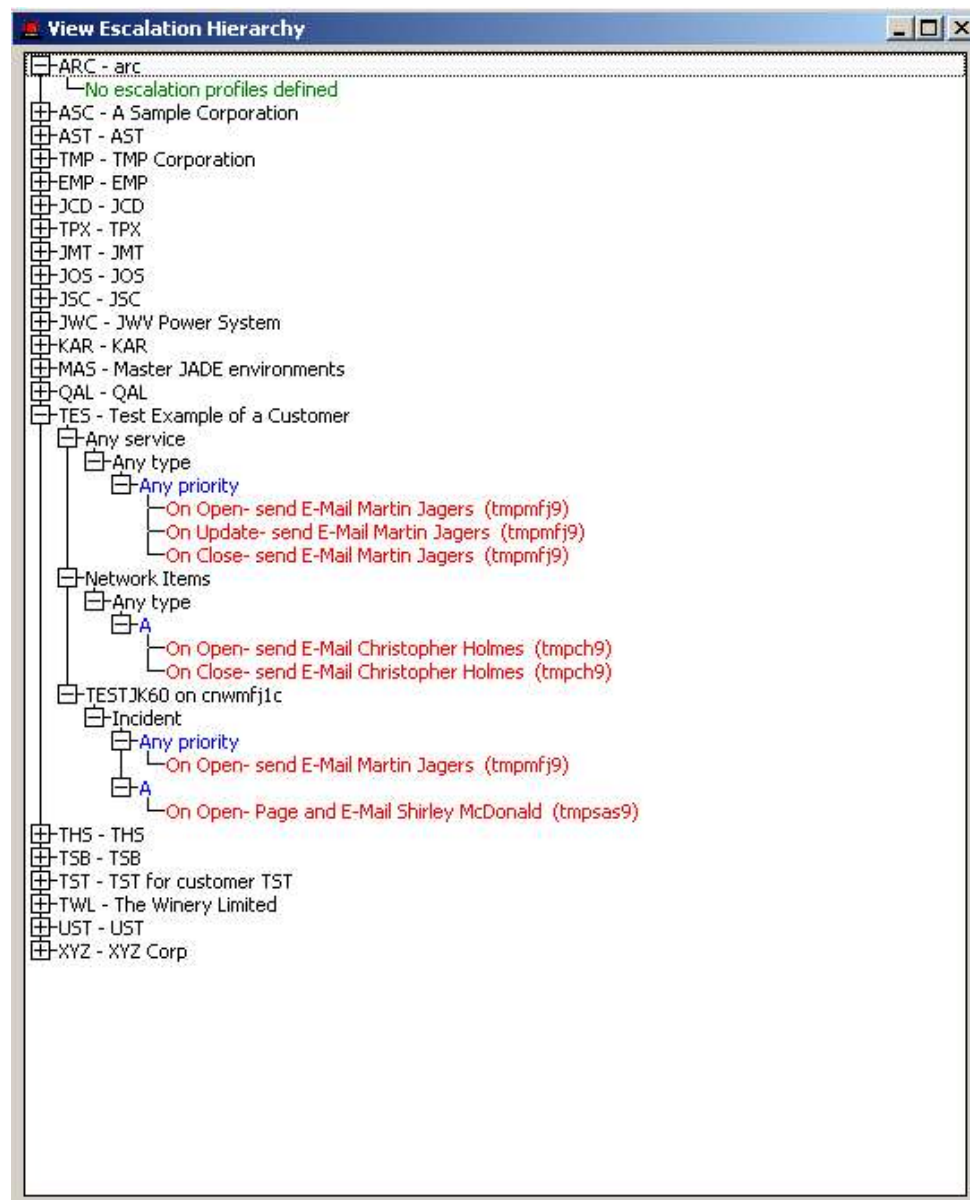
The above form shows the escalation profiles declared for Customer TES.

Double clicking at the various points in the tree will cause all lower branches to be expanded.

Double clicking on the blue priority line or on any of the red escalation profile declarations will bring up the escalation maintenance form.

Right click in the control will bring up a menu of printing options.

Printing of Escalation

The Escalation Hierarchy form allows three print options:

- Print Current Display

- Print Escalation for Selected Customer

- Print Selected Items

Print Current Display

This prints the current contents of the form as currently displayed regardless of selection status.

Print Escalation for Selected Customer

The menu item will only be enabled if a customer entry has been selected. Note that all escalation for the customer will be printed regardless of whether the items have been expanded or visible.

Print Selected Items

This allows one or more items to be selected and will print only the selected items.

4.6.6. Escalation Scenario Form

This form provides the user to see exactly what escalation notifications will occur for a given customer, service, call type and priority.

As can be seen from the above example, where personnel have been defined in a more significant profile (where more of the call criteria specified match) then less significant definitions are superseded and shown as such.

The entities shown in blue would be the subject of escalation should a call with the specified customer, service, call type and priority be created now and meet the escalation type criteria (open, update, close etc).

4.6.7. Escalation Maintenance Form

The form below is used to add, update and delete escalation profiles.

In the state shown below, the personnel shown can be updated to have redirection declared or not, personnel shown may be removed from the profile or in fact, the whole profile can be deleted. Refer to text below on significance of redirection.

If a new person or a different type of escalation is required to be set up then the above form is displayed by clicking on the **Add** button.

The combo box allows the selection of a staff member, a role or a third party contact to be selected.

If a staff member is selected, then the check box **Redirect if Absent** is enabled. Checking this means that if the staff member is absent then the staff member concerned will receive an email (regardless of whether page was defined) in their absence and their first immediate manager who is not absent will be advised according to the notification method selected.

The escalation types are self-explanatory. If time-based escalation is selected, then text boxes are provided to enter the days and time.

4.7. Issuing Reminders

This functionality is provided via a Tracker call. In the call form, there is a sheet labelled 'Reminders' which allows the addition of and maintenance of existing reminders. This same sheet also provides a history of any reminders that were issued.

A reminder can be sent as an alert (available to super-users only), as an email or via paging. If the medium is email or paging, then this may be directed to a single entity, a person, a role or a third-party contact as long as that entity has an email or paging address.

The reminder must specify a start date and time, and optionally can be repetitive until call closure or up to the specified end time. Reminders can have text supplied and/or can include the parent call details (one or other must be provided).

Superusers can update or delete any reminder, otherwise update/delete activity is restricted to the author of the reminder. All users who have access to the call may view the reminder details.
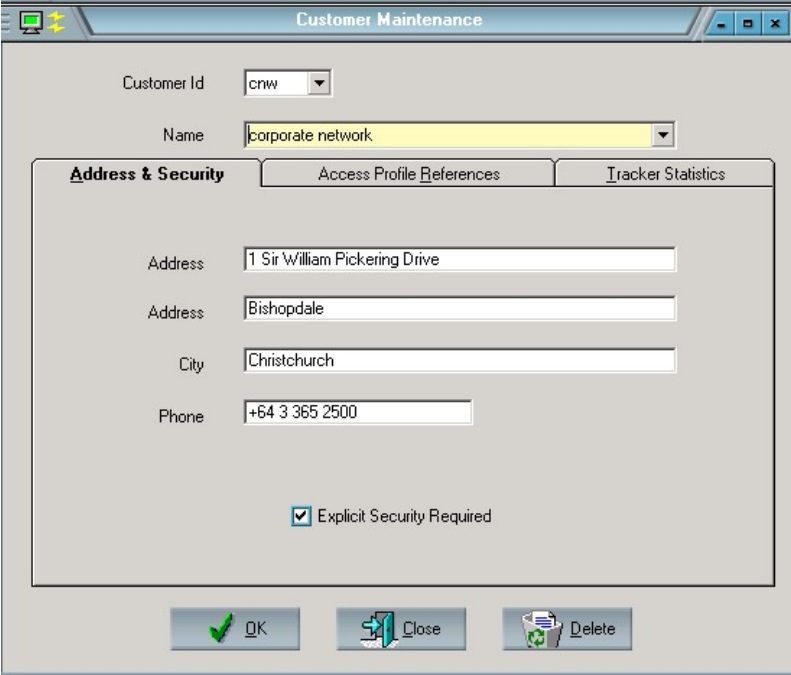
4.8. Outage Recording and Reporting

Outage events can be opened as part of a new call or added after a call has been opened. As the event concerned will have occurred at a specific date/time, the outage event allows the specification of a date and time.

Outage history is displayed as part of the normal call text. The history line font being shown in red differentiates this history from standard history. Calls that contain outage events are highlighted in the various summary screens by the table cell containing the call reference being red and the font being white.

The Advanced Search facility provides the ability to include calls with outages (the default), exclude calls with outages or to restrict the search to just those calls that have outages.

The printing facility permits the inclusion of outage history as one of the options for printing history.

4.9. Customer Definition

Customers can be defined by this form. To view existing customers, the selection can be done either on the unique 3-character customer prefix or by the full name of the customer.

The name must be a unique item and may not be empty.

The address fields (address and city) and phone are free format fields and are optional.

The check box 'Explicit Security' identifies whether the environments for a customer need to be explicitly allocated to a user before the user can see details or if the user is implicitly allowed to view these details by being able to view the customer entity.

If the Tracker module has been implemented then two other sheets are provided otherwise just one additional sheet may be seen.

4.9.1. Access Profile References

The sheet shown above identifies which users have been granted access to this customer. To view the specific details of the type of access and which environments and services the users above may access, this can be viewed via the Operator Maintenance form and the Access Profile Maintenance form accessible from that.

4.9.2. Tracker Statistics

This sheet is only visible if the JADECare Tracker module has been implemented. This provides a statistical analysis of calls for the customer by service and also overall totals for the customer.

Opened   The count of calls opened in that month. This open count does NOT include the reopened count.

Closed   The count of calls closed in that month.

Reopened   The count of calls that were reopened in that month. This count is not a subset of the open count nor does it mean these calls are still open.

BEWARE. Calls opened against service A could be closed against service B and re-opened against service C.

4.10. Location Definition

One or more locations may be defined for a customer entity.

The location name must be unique within those locations already defined for the customer. The locations are used to provide meaningful information as to where a machine (server host) is located.

4.11. View Calls for Single User

This form may be displayed via hot key **CTRL-U** or via menus View | Calls | Call For User

A single entity may be selected via the top left combo box.

Check boxes have been provided to include calls as follows:

- include closed calls for entity selected
- include calls for roles associated with selected entity if a staff member
- include watched calls for logged on user
- include calls where selected entity has been name as a contact
- include calls where it is linked to a PAR in PARSYS
- include calls for selected entity where a resolution id exists

If logged on as a super user or CSR, then this form may also be used to reassign selected calls from the selected entity to a new selected entity. The same change

can also be made for where the selected entity is defined as a contact. This allows for the bulk reassignment of calls should staff change duties or leave the company.

4.12. View Calls for Multiple Users / Roles

This form may be displayed via hot key **CTRL-E** or via menus View | Calls | Call For Entities

The above form allows for the selection of multiple users and / or roles and to be able to view all calls that are assigned to such. Further options are available to :

- be able to view such entities calls where they are the contact
- view such entities watched calls.

Note that the colour coding of the screen is as follows :

- call shown is assigned to the logged on operator, colour is green
- call shown has logged on operator as a contact, colour is yellow
- call shown is marked as Watched by logged on operator, colour is cyan
- all other calls are shown in pale blue.

The selection options may be changed by clicking on the button marked **Change Selection and/or Options**, which will bring up the following form.
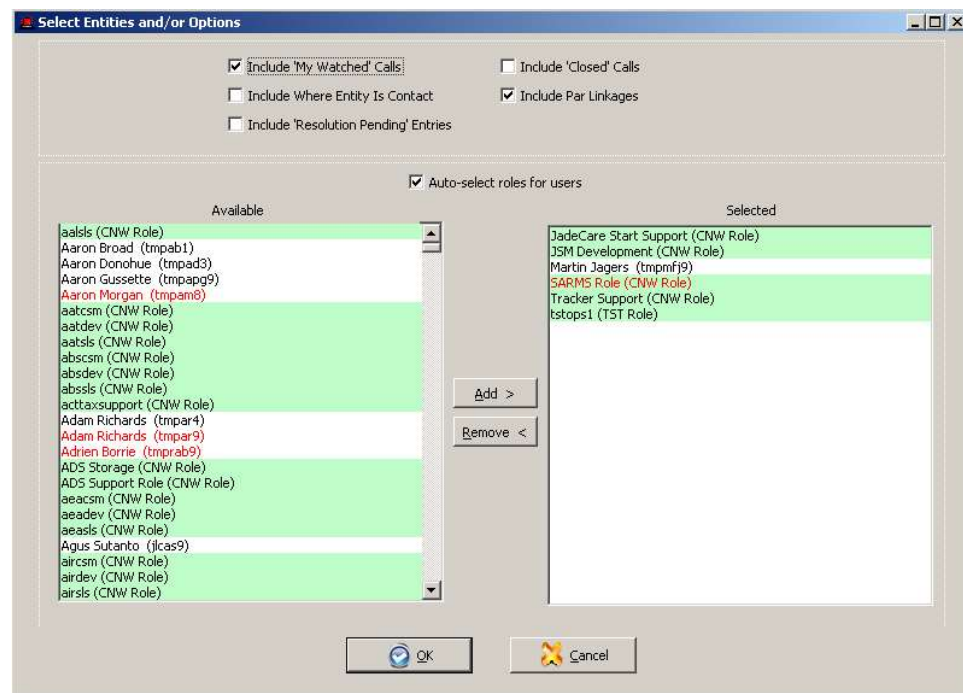
Check boxes are provided to allow the inclusion of:

- Watched calls (for logged on user)

- Include calls where selected entities have been defined as the call contact

- Include closed calls for selected entities

- Include calls where the call has been linked to a PAR in PARSYS.

- Include calls where the call has an associated resolution id

The check box **Auto-select roles for users** may be set or reset as each selection is made from the available list. If the check box is set and the available selection is a staff member, then all roles associated with that staff member will also be selected.

Once selection has been completed, click **OK** to return to the parent form and have the refreshed selection displayed.

4.13. Tracker Web Service

This facility is restricted for use within JADECare 24.

4.13.1. Overview

This initial Tracker Web Service implementation is to provide a service to Parsys (Product Anomaly Reporting system used by Jade Software Corporation plants).

The service provides the following entry points:

- validateCallReference
- updateCall
- closeCall
- reopenCall

The above entrypoints allow Parsys to associate an existing product document (PAR or Contact) with an existing Tracker call and once that has been accomplished to be able to update, close and/or reopen the call concerned.

These updates are then subject to the Tracker rules for assignment and escalation defined.

4.13.2.   Application

The service is provided by application **ScmWebServiceV1** which executes as a background application in the database server node.

To execute this application automatically when **JossCommsMgr** is started set the checkbox **Start Tracker – Parsys Web Service** in the Tracker sheet of the **System Options** form.

The application may also be started and stopped via a Super User or Operator screen using the **File | Applications | Tracker Web Service** menu options.

Startup, ini file settings, request and error statistics, shutdown and every request and response made to and provided by the service are logged into a file **scmwebservicev1_<ccyymm>.log** under the activity logs directory.

4.13.3.   Initialization File Options

There are several settings that may be defined in the initialization file to mandate or not the use of the secure HTTP protocol (HTTPS) and to explicitly list the hosts from which web service requests will be accepted.

If these are defined and are contravened then an exception is issued and the transaction is aborted.

Refer to section above called **JADE Initialization File.**

4.13.4.   IIS Configuration

When this service is implemented then the host where the web service application executes will require IIS to be configured.

A virtual directory is required to identify where the jadehttp.dll is to be executed, this directory will be <env>/server/c_bin where <env> is the environment name of the JSM system.

The following directories will also need to be defined:

- <env>/server/c_misc/bin_public

- <env>/server/c_misc/bin_public_jadehttp/ini

- <env>/server/c_misc/bin_public_jadehttp/logs

- <env>/server/c_misc/bin_public_jadehttp/transfer

An initialization file named
<env>/server/c_misc/bin_public_jadehttp/ini/jadehttp.ini will need to be created
with the following contents:

```
[Jadehttp Logging]
trace=false
traceFile=default

[Jadehttp Files]
fileTransferDirectory=default
Firewall=false

[ScmWebServiceV1]
TcpConnection=127.0.0.1
FirstTcpPort=<port number>
LastTcpPort=<port number>
MaxQueueDepth=0
GroupSharesConnections=false
VirtualDirectory=<virtual directory name>
```

The <port number> is to be allocated by the networking group and configured in
the above initialization file and also declared to the application
ScmWebServiceV1 using the Development Environment's Application Browser|
Change form.

The <virtual directory name> is that declared to IIS identifying the jadehttp.dll
location.

4.14. User Preferences

This release introduces the ability for users to define their own preferences on how information is displayed in Tracker call summary tables. This includes which columns are visible, their display order and their sort order.

Right clicking the mouse over the fixed heading row in the table presents the user preferences form.
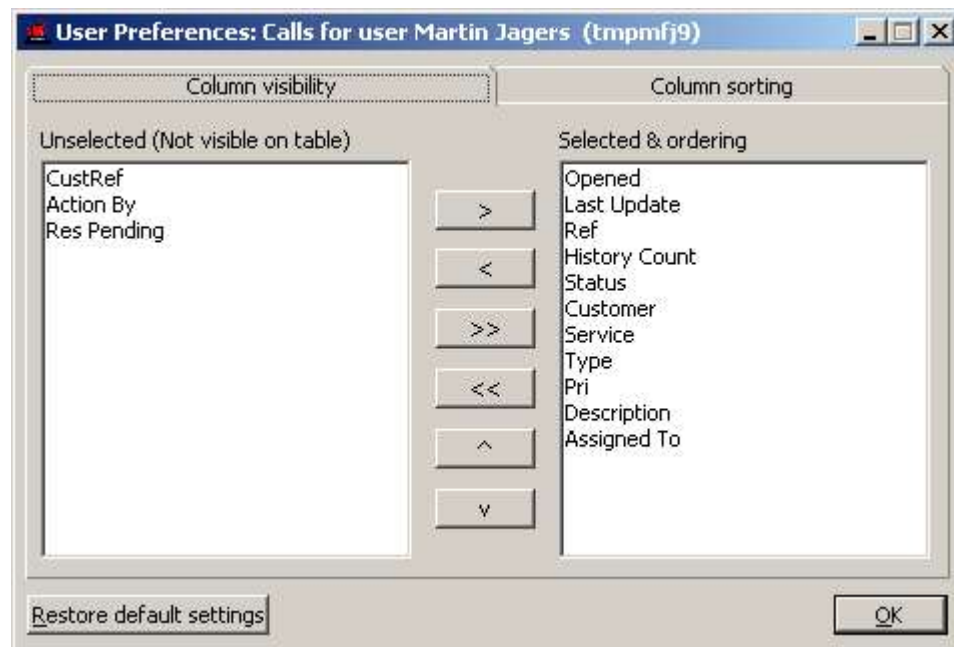
In the example above the 'Customer' and 'Assigned To' columns have been excluded from viewing in the 'Calls for User' form. The order in which the columns are displayed in the table is represented in the right hand list box.
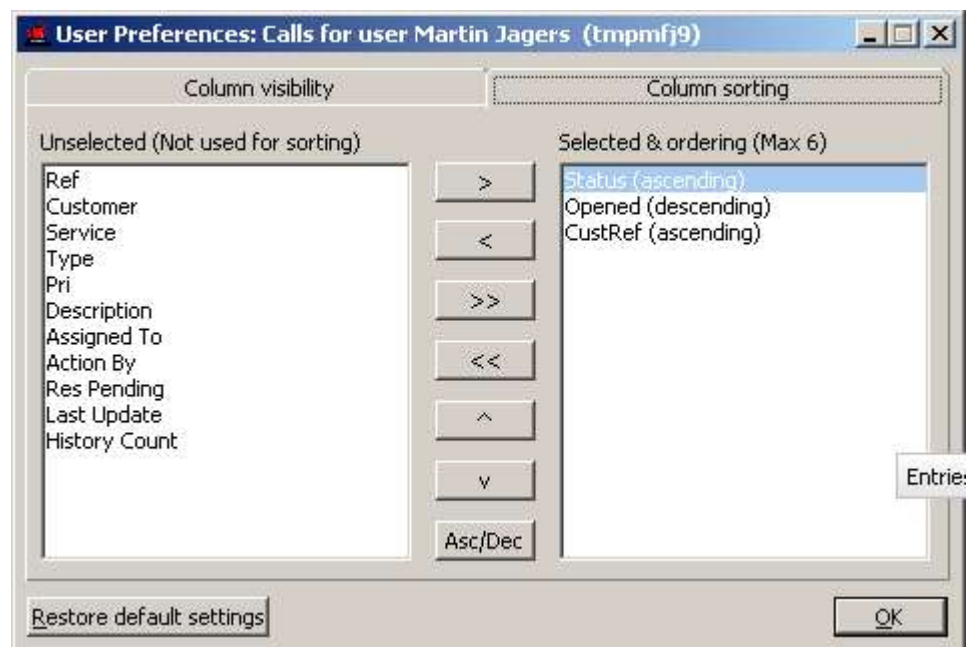
The column sorting tab sets the default sort order for the table. In the example above Status is the primary sort key followed by subsequent sort keys in the order defined.

Clicking the OK button applies these settings immediately and the settings are retained across sessions.

Preferences are unique to each table.

NOTE : If a user double clicks a single column heading in a table, then the sorting defined in the user preference is superseded by sorting on the column clicked. Opening the form again will again default to the users defined preferences.