



J A D E TM

JADE Parsys Application

User's Guide

VERSION 2.3



Copyright © 2008
Jade Software Corporation Limited
All rights reserved

Jade Software Corporation Limited cannot accept any financial or other responsibilities that may be the result of your use of this information or software material, including direct, indirect, special or consequential damages, or loss of profits. There are no warranties extended or granted by this document or software material.

You should be very careful to ensure that the use of this software material and/or information complies with the laws, rules, and regulations of the jurisdictions with respect to which it is used. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Jade Software Corporation Limited.

The information contained herein is subject to change without notice. Revisions may be issued to advise of such changes and/or additions.

Copyright © 2008 Jade Software Corporation Limited.
All rights reserved.

JADE is a trademark of Jade Software Corporation Limited. All trade names referenced are the service mark, trademark, or registered trademark of the respective organisation.

Contents

Before you Begin	5
What you Need to Know	5
What's Included in this Guide	5
A Note on User Interfaces	6
Conventions	6
 Chapter 1 Getting Started	 8
Overview	9
Signing On and Off	9
Signing On to the Parsys Application	9
Signing Off from the Parsys Application	11
Logging Off from the Parsys Application	11
Changing Your Password	11
Using the Parsys Application	12
Navigating Around the Parsys Application	12
Using the Menus	13
File Menu	14
News Menu	14
Client Menu	14
Search Menu	15
Hot Fixes Menu	15
Window Menu	15
Help Menu	15
Using Function Keys and Shortcut Keys	16
Changing Your View of Parsys	17
Applying a Skin to Change the Parsys Window Appearance	17
Phases of a Contact	19
Displaying Parsys Version Information	20
 Chapter 2 Maintaining Contacts	 21
Maintaining Contacts	22
Overview	22
Adding a Contact	22
Updating a Contact	25
Closing a Contact	27

ParsysUG-2.3

Before you Begin

The JADE *Parsys Application User's Guide* is intended as the main source of information when you want to search for, add, update, or view fault reports for your Jade Software Corporation Limited-supplied software product.

What you Need to Know

You should be familiar with:

- Operational concepts of IBM-compatible PCs.
- Microsoft Windows 2003 Server, Windows XP, or Windows 2000.
- Operational concepts of using a standard spell-checking dialog.

What's Included in this Guide

The JADE *Parsys Application User's Guide* has the two chapters and one appendix, which are listed in the following table.

Chapter 1	Provides instructions for signing on and off, general use of the Parsys application (Parsys/cnwpuctf), and using the online product information.
Chapter 2	Provides instructions about searching for existing contacts and adding and updating contacts.
Appendix A	Provides instructions for installing Parsys, automatically upgrading software, and connectivity troubleshooting.

Although this PDF file is compatible with Adobe Reader versions 5.0 through 7.0, we recommend you use Adobe Reader 8.0 as it offers advanced functionality and may reduce printing problems in some situations.

You can download and install the free Adobe Reader version 8.0 from the Adobe Web site (www.adobe.com). Select the **Get Adobe Reader** icon on the Adobe Home page.



A Note on User Interfaces

You can select various options (or skins) to customise your own user interface. The screen shots used for illustration in this documentation do not always reflect the look and feel of the user interface that your organisation has chosen.

The *JADE Parsys Application User's Guide* uses a generic version of the user interface to illustrate functionality.

Conventions

The *JADE Parsys Application User's Guide* uses consistent typographic conventions throughout.

Convention	Description
Arrow bullet (➤)	Step-by-step procedures. You can complete procedural instructions by using either the mouse or the keyboard.
Bold	File names, menu commands, and form fields, as well as literal values stored, tested for, and sent by Parsys.
<i>Italic</i>	Parameter values or placeholders for information that must be provided; for example, if instructed to enter <i>user-code</i> , type your actual user code instead of the word or words shown in italic type. Italic type also signals a new term. An explanation accompanies the italicized type. Document titles and status and error messages are also shown in italic type.
Bright blue text	Enables you to click anywhere on the cross-reference text (the cursor symbol changes from an open hand to a hand with the index finger extended) to take you straight to that topic. For example, click on the “ Using the Menus ” cross-reference to display that topic.
Bracket symbols ([])	Indicate optional items.
Vertical bar ()	Separates alternative items.
Monospaced font	Syntax, code examples, and error and status message text.
ALL CAPITALS	Directory names, commands, and acronyms.
SMALL CAPITALS	Keyboard keys.

Key combinations and key sequences appear as follows.

Convention	Description
KEY1+KEY2	Press and hold down the first key and then press the second key. For example, “press SHIFT+F2” means to press and hold down the SHIFT key and press the F2 key. Then release both keys.
KEY1,KEY2	Press and release the first key, then press and release the second key. For example, “press ALT+F,X” means to hold down the ALT key, press the F key, and then release both keys before pressing and releasing the X key.

The terms used in this document are listed in the following table.

Term	Description
Contact	A fault report or a query that you initiate in Parsys.
PAR	Product Anomaly Report (PAR). When product support cannot directly answer your question, your contact is converted to a PAR for assigning to the appropriate product plant.
Product	The software product that you have purchased from Jade Software Corporation Limited; for example, JADE, JADE Master Terminal, JADE Student Management System, JADE Co-ordinated Care, JADE Star, and so on.

Chapter 1

Getting Started

This chapter covers the following topics.

- [Overview](#)
- [Signing On and Off](#)
 - [Signing On to the Parsys Application](#)
 - [Signing Off from the Parsys Application](#)
 - [Logging Off from the Parsys Application](#)
- [Changing Your Password](#)
- [Using the Parsys Application](#)
 - [Navigating Around the Parsys Application](#)
 - [Using the Menus](#)
 - [Using Function Keys and Shortcut Keys](#)
 - [Changing Your View of Parsys](#)
 - [Phases of a Contact](#)
- [Displaying Parsys Version Information](#)

Overview

The Parsys application (**Parsys/cnwpucf**) manages product fault reports and queries for Jade Software Corporation Limited products by:

- Ensuring that all fault reports or queries are assigned a unique number for future reference.

Note The number that is assigned is unique to that product only; that is, it may be used for other JADE products.

- Ensuring that all relevant software release details are entered.
- Ensuring a brief and a full description of the fault is entered.
- Allowing attachment of any supporting material such as application logs.
- Allowing easy identification of the client reporting the fault or query.

If you have the appropriate permission, you can access Parsys on the managed server over a remote connection and view or maintain all contacts for which you have permission.

As a client user, you initiate a fault or query (known in Parsys as a *contact*), which then goes through a number of phases, including the following.

- Initial investigation by the support staff for the product against which you opened the contact.
- Provision of an answer directly by the support staff.
- Opening of a Product Anomaly Report (PAR) to the appropriate product plant within Jade Software Corporation Limited for further investigation.

Signing On and Off

This section covers the following topics.

- [Signing On to the Parsys Application](#)
- [Signing Off from the Parsys Application](#)
- [Logging Off from the Parsys Application](#)

For details, see the following subsections. (For details about installing the Parsys application and automatically upgrading software, see “[Installing the Parsys Application](#)” and “[Automatically Upgrading Software](#)”, in Appendix A.)

Signing On to the Parsys Application

➤ To initiate the Parsys application

- Select the **Parsys** icon (the program shortcut) on your desktop so that it is highlighted and then press the ENTER key.

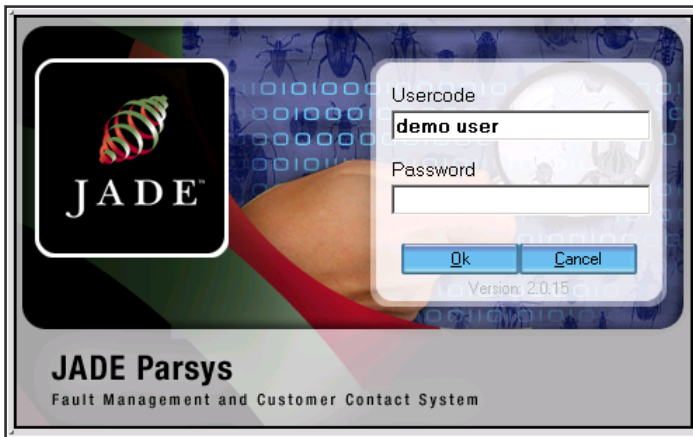
Alternatively, double-click on the **Parsys** icon.



When you have started the Parsys application, the start-up form is displayed while the software initialises and a connection is made to the application server workstation on which the Parsys database is located.

Note You are required to reset your password the first time you sign on to the Parsys application, as the one that enables you to access the application initially was set by someone other than you.

When Parsys has started, the sign-on form shown in the following diagram is then displayed.



➤ To sign on to the Parsys application

1. In the **Usercode** text box, enter your Parsys *user-code*.

The user code is case-insensitive.

2. In the **Password** text box, enter the password associated with your user code. As this is a hidden text box for security reasons, each character is represented by an asterisk (*).

The password is case-sensitive.

If you have forgotten your password or you exceed the permitted number of password attempts so that you are then unable to sign on to Parsys, contact your Parsys administrator, who will reset your password and enable your access to the system. (You will have to reset your password immediately after you have signed on with your newly allocated password.)

3. Click the **OK** button. Alternatively, click the **Cancel** button to abandon your entries.

When you enter a valid user code and password combination, the Parsys background window is then displayed. For details, see “[Using the Parsys Application](#)” and “[Navigating Around the Parsys Application](#)”, later in this chapter.

See also “[Signing Off from the Parsys Application](#)” or “[Logging Off from the Parsys Application](#)”, in the following sections.

Signing Off from the Parsys Application

- To exit from the Parsys application, perform one of the following actions
 - Select the **Exit** command from the File menu.
 - Click the close icon (☒) at the top right corner of the window.
 - Select the **Close** command from the Control-Menu (that is, the icon at the top left corner of the window).
 - Press ALT+F4.

The Parsys application is then closed down.

Logging Off from the Parsys Application

- To log off from the Parsys application
 - Select the **Logoff** command from the File menu.

The Parsys application is then closed down and the sign-on form is displayed again, to enable you to sign on as a different user. (For details, see [“Signing On to the Parsys Application”](#), earlier in this chapter.)

Changing Your Password

You can change your password for Parsys at any time. If you think that someone else knows your password, you should change it as soon as possible. In addition, we recommend that you change your password regularly.

- To change your password
 1. Select the **Change Password** command from the File menu.

The Change Password form, shown in the following diagram, is then displayed.



The screenshot shows a dialog box titled "JADE Parsys" with the subtitle "Fault Management and Customer Contact System". On the left is the JADE logo, which features a stylized DNA helix. On the right is a form with three text input fields labeled "Old Password", "New Password", and "Repeat New Password". Below these fields are two buttons: "Ok" and "Cancel". The background of the dialog box has a blue and green abstract design with binary code (0s and 1s) and silhouettes of insects.

2. Enter your current password in the **Old Password** field.

The current password is case-sensitive.

Note As this is a hidden field for security reasons, each character is represented by an asterisk character (*).

3. Enter your new password in the **New Password** field.

The new password is case-sensitive.

4. Re-enter your new password in the **Repeat New Password** field.

5. Click the **OK** button. Alternatively, click the **Cancel** button to abandon your entries.

Your password is then updated.

Using the Parsys Application

This section covers the following topics.

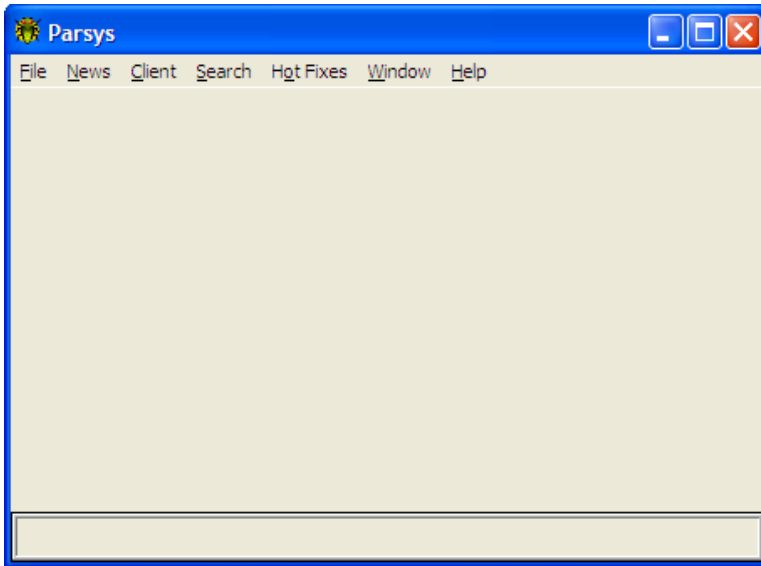
- [Navigating Around the Parsys Application](#)
 - [Using the Menus](#)
 - [Using Function Keys and Shortcut Keys](#)
 - [Changing Your View of Parsys](#)
- [Phases of a Contact](#)
- [Displaying Parsys Version Information](#)

For details, see the following subsections.

Navigating Around the Parsys Application

The Parsys background window is opened when you sign on to the Parsys application.

The following diagram shows the Parsys background window that is displayed when you sign on to Parsys for the first time.



If you had forms open when you last logged off from Parsys, they are reopened and restored to their previous positions when you next logon to Parsys.

Navigate to functions in Parsys by using:

- Menu commands (for details, see [“Using the Menus”](#), later in this chapter)
- Tabs on tables when you have a form with a table displayed

Using the Menus

The menus (and the commands in menus) that are displayed at any time depend on your level of access to Parsys. For example, you can access the Administration menu only if you have the appropriate administrative level of permission.

Note Menu commands that are not available for selection are greyed out or not visible.

➤ To access a menu

- Select the required menu.

A drop-down list is then displayed, showing the commands that are available in that menu.

You can use the menus listed in the following table in Parsys.

Menu	Provides access to commands so that you can...
File	Exit or log off from the Parsys application, set user preferences, and change your password
News	Information such as scheduled outages, past and pending for Parsys
Client	Open a new contact and list your open contacts and PARs
Search	Perform searches using keywords and other user-specified criteria
Hot Fixes	Download hot fixes for supported product releases
Window	Display open forms, tile open forms, and list open forms
Help	Access information about the version of Parsys

For details, see the following subsections.

File Menu

The File menu provides the commands listed in the following table, which enable you to maintain your user password, exit from, and log off from the Parsys application.

Command	For details, see...
Change Password	Changing Your Password , earlier in this chapter
Logoff	Logging Off from the Parsys Application , earlier in this chapter
Exit	Signing Off from the Parsys Application , earlier in this chapter

News Menu

The News menu provides information about Parsys; for example, updates of past and scheduled outages.

Client Menu

The Client menu provides the commands listed in the following table, which enable you to open a new contact or list your open contacts and PARs.

Command	Enables you to...
Open Contact	Open a new contact for one of your products
List my open Faults & Contacts	List your open faults and contacts in Parsys

For details, see “[Maintaining Contacts](#)” and “[Searching for, Viewing, and Printing a Contact or PAR](#)”, in Chapter 2.

See also “[Applying a Skin to Change the Parsys Window Appearance](#)” under “[Changing Your View of Parsys](#)”, later in this chapter.

Search Menu

The Search menu opens the search form, which enables you to search for existing contacts and PARs by keyword and other criteria.

For details, see “[Searching for Other Users’ Contacts and PARs](#)”, in Chapter 2.

Hot Fixes Menu

The Hot Fixes menu enables you to download hot fixes for supported product releases.

Command	Enables you to...
Hot Fixes	List available hot fixes for supported product releases

Window Menu

The Window menu provides the commands listed in the following table, which enable you to specify the display of forms and view windows on your workstation monitor or desktop.

Command	Enables you to...
Arrange Icons	Arrange all minimised form icons in an orderly manner in the lower area of the Parsys background window
Cascade	Arrange open forms in an overlapping pattern so that the title bar of each form remains visible
Tile Horizontal	Tile all open windows horizontally
Tile Vertical	Tile all open windows vertically

The lower portion of the Window menu lists all currently open forms in the order in which they were opened. The current (active) form is indicated by a check mark symbol (✓) to the left of the form name.

Help Menu

The Help menu provides the command listed in the following table, which enables you to access Parsys version information.

Command	Opens the ...
About	About Parsys form, which provides version and copyright information about the Parsys application. (For details, see “ Displaying Parsys Version Information ”, later in this chapter.)

Using Function Keys and Shortcut Keys

You can use the keyboard to perform functions in Parsys. For example, you can:

- Use the TAB key to move the cursor to the next control in a form or a table cell.
- Use the HOME key to move the cursor to the start of the current control or to the top of a table column.
- Use the END key to move the cursor to the end of the current control or to the bottom of a table column on a form.
- Use the CTRL+F6 keys to cycle through all open forms (that is, hold down the CTRL key and press the F6 key).

Alternatively, to activate an open form, select the appropriate form from the list in the Window menu.

- Use the ALT+TAB keys to cycle through all open applications (that is, hold down the ALT key and press the TAB key).
- If the cursor is positioned in the row of a table or in a form control that contains a list, use the up arrow (↑) or the down arrow (↓) to move your selection to the next row up or down the table or to select the previous or next item in the list, respectively.
- Use a shortcut key listed in the following table to drop down the appropriate menu, and then use the → arrow to open a submenu, or the ↑ arrow or the ↓ arrow to move your selection up or down the menu commands.

Key Combinations	Drops down the ...
ALT+F	File menu
ALT+N	News menu
ALT+C	Client menu
ALT+S	Search form
ALT+O	Hot Fixes menu
ALT+W	Window menu
ALT+H	Help menu

Use the keyboard to select a menu command when a menu is dropped down, by pressing the key that corresponds to the underlined character in the command that you want to select.

- Use a shortcut key listed in the following table to perform insert and delete functions in a control by using the keyboard.

Key	Function
BACKSPACE	Deletes the character to the left of the cursor
DEL	Deletes the character to the right of the cursor
INSERT	Toggles the insert mode on or off

- Use a shortcut key to action a click of a button on a form, by pressing the ALT key and the appropriate shortcut (underlined) key to action that button.
- Use a combo box to perform one of the following actions.
 - Click the ▼ symbol at the right of the control, and then select the required value from the list that is displayed.
 - Type your data in the text area.

The entry in the control list that is alphabetically equal to or greater than the text that you enter is selected. You therefore only have to enter as much text as required to uniquely identify a specific entry.

Changing Your View of Parsys

Parsys provides you with the commands that enable you to change the appearance of Parsys during your work sessions.

These changes are described in the following subsection.

Applying a Skin to Change the Parsys Window Appearance

You can change the appearance of the Parsys background window and all forms that are displayed, by applying a skin.

Skins are a series of images that are applied to the caption line, menu line, and border areas of each form to provide an enhanced look and feel to each form.

Some skins can also change the appearance of images for button, check box, and option button controls.

Note The application of a skin applies only to *your* view of Parsys and it is retained for future work sessions or until you change it.

➤ To select a skin to change your view of Parsys

1. Select the **User Preferences** command from the File menu.
The User Preferences form is then displayed.
2. Click on the **Look & Feel** tab.

The **Look & Feel** sheet, shown in the following diagram, is then displayed.

The screenshot shows the 'User Preferences' dialog box with the 'Look & Feel' tab selected. The dialog has a blue title bar with a close button (X) in the top right corner. Below the title bar are five tabs: 'Product Defaults', 'Search Defaults', 'Look & Feel', 'Sundry', and 'Email options'. The 'Look and Feel' section contains the following options:

- ☒ Use JADE 6 version of skins (dropdown menu set to '<none>')
- ☐ Allow multiple quick pads
- ☐ Quick Pads require manual refresh when criteria changed
- ☒ Use gridlines on tables in search window, Quick Pad, etc
- ☒ Use autosize on tables in search window, Quick Pad, etc
- ☒ Use bold where I was an assignee on Search Results & Quick Pads
- ☒ Use back color to highlight entries on Search Results & Quick Pads
- ☐ Use standard combo for e-mail address (faster on slow link)
- ☐ Automatically close Update Par form if Par is closed
- ☐ Automatically open Update Par form when converting Contact to Par
- Display entries in the recent documents quick pad
- Font for tables & lists: ...
- ☐ Display system tray icon for new/reopened contact
- ☐ Play sound for new/reopened contact -> ...

Below these options is a section titled 'Salutation to be added to automatic e-mails' with a large text area for input. At the bottom of the dialog is an button.

Note Not all options displayed on this form are applicable to a client user.

3. Select the required skin in the skin selection combo box.
The skin that you select is immediately applied to the background window and any forms that are currently displayed.
4. Repeat step 3 until you have applied the skin that you desire for your Parsys work sessions.
5. Click the **Update** button to save your user preferences. Alternatively, click the close icon (X) at the top right corner of the form to abandon your selections.

➤ **To turn off the display of a skin**

1. Select the **User Preferences** command from the File menu.
The User Preferences form is then displayed.
 2. Click on the **Look & Feel** tab.
The **Look & Feel** sheet is then displayed.
 3. Select **<none>** in the skin selection combo box.
The skin is then removed from the background window and any forms that are currently displayed.
-
- Note** Not all of the options displayed on this dialog are applicable to a client user.
-
4. Click the **Update** button to save your user preferences.

Phases of a Contact

A contact can pass through several phases, from your initial opening of the contact to the closure of the contact or the PAR.

Phase	Description
Contact	Initial reporting of a problem, new feature suggestion, or documentation issue
PAR	Used to pass problem onto the development staff for further investigation
Qualification	Used by qualification staff to record the results of testing
Documentation	Used by documentation staff to record changes to the documentation
Approval for release	Used by the development manager to indicate that a patch is available for release

Displaying Parsys Version Information

➤ To display version information for the Parsys application

- Select the **About Parsys** command from the Help menu.

The Parsys About form, shown in the following diagram, then displays information about the version of the Parsys application that you are running and copyright information.



To close the Parsys About form, click the **Close** button.

Chapter 2

Maintaining Contacts

This chapter covers the following topics.

- [Maintaining Contacts](#)
 - [Overview](#)
 - [Adding a Contact](#)
 - [Updating a Contact](#)
 - [Closing a Contact](#)
 - [Reopening a Contact](#)
 - [Adding a Conversation Entry](#)
- [Searching for, Viewing, and Printing a Contact or PAR](#)
 - [Searching for Your Open Contacts and PARs](#)
 - [Searching for Other Users' Contacts and PARs](#)
 - [Viewing a Contact or PAR](#)
 - [Printing a Contact or PAR](#)

Maintaining Contacts

This section covers the following topics

- [Overview](#)
- [Adding a Contact](#)
- [Updating a Contact](#)
- [Closing a Contact](#)
- [Reopening a Contact](#)
- [Adding a Conversation Entry](#)

Overview

As a client user, you can add, update, and reopen a contact before it is converted to a PAR.

After a contact has been converted to a PAR, you can continue to add *conversation entries* to the contact details if additional information becomes available for that contact.

You can add a conversation entry to respond to a request for additional information by the Jade Software Corporation development group responsible for the product against which you have opened this contact or PAR.

You can also add conversation entries if you want to dispute a PAR closure reason. For details, see “[Adding a Conversation Entry](#)”, later in this chapter.

Adding a Contact

Use the Add New Contact form to add a new contact for any of the Jade Software Corporation products that have been made available to you in Parsys.

➤ To add a new contact

1. Select the **Open New Contact** command from the Client menu.

The Add New Contact form, shown in the following diagram, is then displayed.

Add New Contact

Product: JADE | Contact Type: Contact | Priority: C

Updater: | Client: | Client Ref: |

Client O/S: | AppServer O/S: | Server O/S: |

Release: 6.2.14 | Topic: |

Tracker Link: No

Status: Yet to be opened

Description: |

Contact Details | **Attached Files**

Assignee: |

Prior Entries: |

New Entry: |

☐ E-mail response to --> | Cc to --> |

Update Contact | **Close Contact** | **Convert to Par** | **Clear Form For New Contact** | **Move Product** | **Replicate** | **Link to Tracker**

Print/Email/Extract | **Quick Print** | **Quick E-mail** | **Watch**

2. Select the appropriate product from the **Product** combo box.
3. In the **Contact Type** combo box, select the contact type of **Contact**, **Documentation Fault**, **Fault**, or **New Feature Suggestion**, to specify the type of contact that you want to initiate.
 - The **Contact** option enables you to ask a general question about the product.
 - The **Fault** option enables you to specify a potential fault with the product.
 - The **Documentation Fault** option enables you to specify a problem with the documentation for the product.
 - The **New Feature Suggestion** option enables you to specify a new feature suggestion for the product.
4. Select the appropriate priority in the **Priority** combo box. Use a priority of **A** for contacts of high importance, **B** for contacts of medium importance, or **C** for contacts of low importance.

5. Enter your own reference in the **Customer Ref** text box, if required. This text box is built into the keywords for this contact, for ease of subsequent searching for this contact using your own reference.
6. The **Updater** and **Client** combo boxes default to display your user and organisation details. Select different entries, if required.

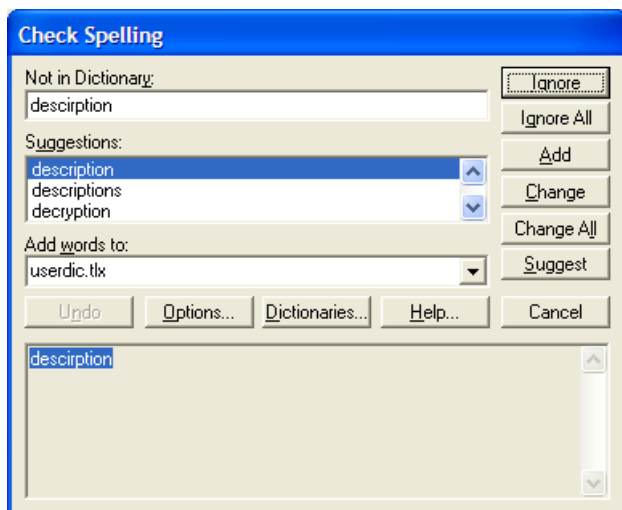
Note The e-mail address of the user that you select is displayed in the **Email Response To** field at the bottom of the form.

7. Select the release number of the product in the **Release** combo box.
8. Select the operating system on which you are running your product in the **Client**, **App Server** and **Server O/S** combo boxes.
9. Select the contact topic in the **Topic** combo box.
10. Enter a meaningful brief description of the problem in the **Description** field.
11. Enter a full description of the problem in the **New Entry** field.
12. If you have any supporting files for this problem (for example, application logs), select the **Attached Files** tab and click the **Attach** button, to locate and select the zip file containing these files.
 - Files must be zipped prior to attaching them. You should generally zip all related files into one zip file.
 - Files are not copied to Parsys at this time but are marked for copying when you click the **Update Contact** button.
 - If you subsequently realise that you attached the wrong files or you do not want to attach any files, check the option in the **Select** column of the **Attached Files** table and click the **Delete Selected** button.

The files will be removed, or not attached if they were added in the same update.
13. If you want to receive an e-mail confirmation when your contact is added:
 - a. Check the **Email Response** check box.
 - b. Select your e-mail address from the **Email Address** combo box or if your e-mail address is not currently listed, enter your e-mail address in the **Email Address to** field.
14. Click the **Update Contact** button to add your new contact. Alternatively, click the close icon (✕) at the upper right of the form to abandon your entries.

Parsys validates your input and (assuming that all the required values have been filled) will successfully open your contact.

If you have any incorrectly spelled words or unrecognised words, the Check Spelling form, shown in the following diagram, is displayed.



Use this form in the normal manner, to check the spelling of your input.

When your contact has successfully been added, the Maintain Contact form displays your detailed description of the problem in the **Prior Entries** table, along with an indication of the date and time the entry was made and by whom. The caption line indicates the unique contact number for this product, for future reference.

Updating a Contact

You can add additional *conversation entries* to a contact while it remains a contact and after it has been converted to a PAR.

➤ To update a contact

1. On the Search Parsys Database form, select the contact that you want to update.

For details about locating the contact that you want to update, see “[Searching for, Viewing, and Printing a Contact or PAR](#)”, later in this chapter.

2. Click the **Update** button on the Search Parsys Database form.

The Maintain Contact form is then displayed, showing the details for the selected contact including all prior entries.

3. Adjust any of the general details (for example, **contact type**, **priority**, **release**, and so on), as required.

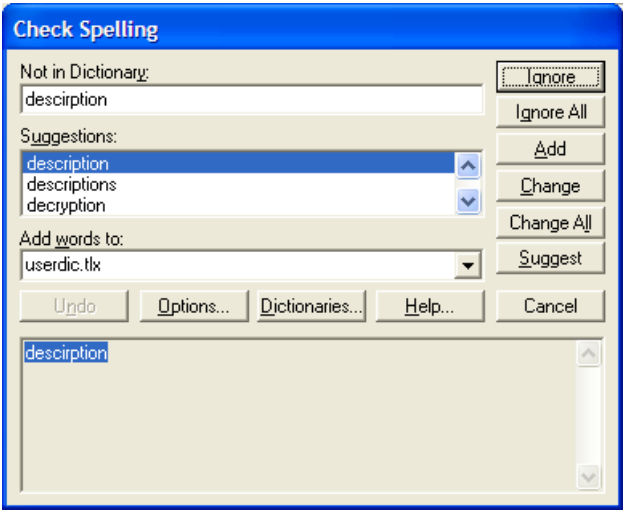
For more details, see steps 3 through 10 in “[Adding a Contact](#)”, earlier in this chapter.

4. Enter any additional details in the **New Entry** text box.
 - If you have any additional files, select the **Attached Files** tab and click the **Attach** button to select the required zip file and attach it (choosing whether or not to retain existing files, as appropriate).
5. If you want to receive an e-mail confirmation of your changes, check the **Email Response** check box.

Note You can adjust the e-mail address by selecting an appropriate entry or by entering a new e-mail address in the **Email Address** combo box.

6. Click the **Update Contact** button.

If you have any incorrectly spelled words or unrecognised words, the Check Spelling form, shown in the following diagram, is then displayed.



Use this form in the normal manner, to check the spelling of your input.

When the contact has successfully added, the Maintain Contact form displays your detailed description of the problem in the **Prior Entries** table, along with an indication of the date and time the entry was made and by whom.

An example of the Maintain Contact form for an updated contact is shown in the following diagram.

Maintain Contact 47672 (Product=JADE)

Product	JADE	Contact Type	Contact	Priority	C
Updater	Sample Entity	Client	Sample Entity	Client Ref	
Client O/S		AppServer O/S		Server O/S	
Release	6.2.13	Topic	General Runtime Issu		
Tracker Link	No				
Status	#47672, Open				
Description	Sample contact brief description				

Contact Details | **Attached Files**

Assignee: [Dropdown]

Prior Entries

- 2. 2008/05/28 14:10 (NZT) Sample Entity
This is an additional entry with more information to help describe the problem.
- 1. 2008/05/28 14:09 (NZT) Sample Entity
Sample contact description.

New Entry

[Text Area]

☒ E-mail response to --> sample@sampleemailaddress.com Cc to --> [Text Field]

Buttons: Update Contact, Close Contact, Convert to Par, Clear Form For New Contact, Move Product, Replicate, Link to Tracker, Print/Email/Extract, Quick Print, Quick E-mail, Watch

Closing a Contact

You can close a contact that you have opened at any time prior to it being converted to a PAR.

➤ **To close a contact**

1. On the Search Parsys Database form, select the contact that you want to close.
For details about locating the contact that you want to update, see “[Searching for, Viewing, and Printing a Contact or PAR](#)”, later in this chapter.
2. Click the **Update** button on the Search PAR Database form.

The Maintain Contact form (shown in the following diagram) is then displayed, showing the details for the selected contact, including all prior entries.

3. Adjust any of the general details (for example, contact type, priority, release, and so on), as required. For more details, see steps 3 through 10 in “[Adding a Contact](#)”, earlier in this chapter.
4. Enter any additional details in the **New Entry** field. If you have any additional files, click the **Attach File(s)** button, to select the required zip file and attach it (choosing whether or not to retain existing files, as appropriate).
5. If you want to receive an e-mail confirmation of your changes, check the **Email Response** check box.

Note You can adjust the e-mail address by selecting an appropriate entry or by entering a new e-mail address in the **Email Address** combo box.

6. Click the **Close Contact** button. If you have any incorrectly spelled words or unrecognised words, the Check Spelling form is then displayed. Use this form in the normal manner to check the spelling of your input.

When the contact is updated, the Maintain Contact form displays your additional details in the **Prior Entries** table, along with an indication of the date and time the entry was made and by whom. The text **Contact closed** is automatically added to your entry.

An example of the Maintain Contact form for a closed contact is shown in the following diagram.

Reopening a Contact

You can reopen a contact that was closed without being converted to a PAR.

➤ To reopen a contact

1. On the Search Parsys Database form, select the contact that you want to reopen. For details about locating the contact that you want to reopen, see “[Searching for, Viewing, and Printing a Contact or PAR](#)”, later in this chapter.
2. Click the **Update** button on the Search Parsys Database form. The Reopen Contact form is then displayed, showing details for this contact.

3. Click the **Update & Reopen** button. The Reopen Contact form, shown in the following diagram, is then displayed.

Reopen Contact 47672 (Product=JADE)

Product: JADE, Contact Type: Contact, Priority: C, Updater: Sample Entity, Client: Sample Entity, Client Ref: , Client O/S: , AppServer O/S: , Server O/S: , Release: 6.2.13, Topic: General Runtime Issu, Tracker Link: No, Status: #47672, Closed in 6.2.13, Description: Sample contact brief description

Contact Details | Attached Files

Assignee: [Dropdown]

Prior Entries:

- 3. 2008/05/28 14:26 (NZT) Sample Entity
The reported problem has been resolved, thank you.
- 2. 2008/05/28 14:10 (NZT) Sample Entity
This is an additional entry with more information to help describe the problem.

New Entry: Acutally, I have realised that I do still require your assistance so I am reopening this contact.

E-mail response to --> sample@sampleemailaddress.com Cc to --> [Empty]

Update & Reopen | Update & Leave Closed | Wrong number

Print/Email/Extract | Quick Print | Quick E-mail | Watch

4. Enter your reopen details into the **New Entry** field.
5. Click the **Update & Reopen** button. Alternatively, close the form to abandon your entries.
- If you have any incorrectly spelled words or unrecognised words, the Check Spelling form is then displayed.

Use this form in the normal manner, to check the spelling of your input.

When the contact has successfully reopened, the Maintain Contact form displays your additional details in the **Prior Entries** table, along with an indication of the date and time the entry was made and by whom.

An example of the Maintain Contact form for a reopened contact is shown in the following diagram.

Maintain Contact 47672 (Product=JADE)

Product: JADE, Contact Type: Contact, Priority: C, Updater: Sample Entity, Client: Sample Entity, Client Ref: , Client O/S: , AppServer O/S: , Server O/S: , Release: 6.2.13, Topic: General Runtime Issu, Tracker Link: No, Status: #47672, Open, Description: Sample contact brief description

Contact Details

Assignee: [Dropdown]

Prior Entries:

- 4. 2008/05/28 14:41 (NZT) Sample Entity
Acutally, I have realised that I do still require your assistance so I am reopening this contact.
- 3. 2008/05/28 14:26 (NZT) Sample Entity
The reported problem has been resolved, thank you.

New Entry: [Text Area]

E-mail response to --> sample@sampleemailaddress.com Cc to --> [Text Field]

Buttons: Update Contact, Close Contact, Convert to Par, Clear Form For New Contact, Move Product, Replicate, Link to Tracker, Print/Email/Extract, Quick Print, Quick E-mail, Watch

Adding a Conversation Entry

You can add a conversation entry to a contact that you opened after it has been converted to a PAR.

➤ To add a conversation entry

1. On the Search Parsys Database form, select the contact to which you want to add a conversation entry.

For details about locating the contact that you want to reopen, see “[Searching for, Viewing, and Printing a Contact or PAR](#)”, later in this chapter.

2. Click the **Update** button on the Search Parsys Database form.

The Add Conversation Entry form is then displayed, showing details for this contact.

An example of the Add Conversation Entry form for a PAR is shown in the following diagram.

Add conversation entry for Par 47672 (Product=JADE)

Product	JADE	Par Type	Fault	Priority	C
Updater	Sample Entity	Client	Sample Entity	Client Ref	
Client O/S		AppServer O/S		Server O/S	
Release	6.2.13	Topic	General Runtime Issue		
Tracker Link	No				
Status	#47672, Open				
Description	Sample contact brief description				

Par Details | **Contact Details** | **Attached Files**

Assignee: Aaron Morgan

Prior Entries

- 5. 2008/05/28 14:46 (NZT) Jade Support
Converting contact to a PAR for further investigation by the Plant.
- 4. 2008/05/28 14:41 (NZT) Sample Entity
Acutally, I have realised that I do still require your assistance so I am reopening this contact.

New Entry

☐ E-mail response to --> sample@sampleemailaddress.com Cc to -->

Update - Add Conversation | Clear Form For New Contact | Link to Tracker

Print/Email/Extract | Quick Print | Quick E-mail | Watch

3. Enter the additional details into the **New Entry** field.

As you type, the **Update – Add Conversation** button becomes enabled, as shown in the following diagram.

Add conversation entry for Par 47672 (Product=JADE)

Product: JADE Par Type: Fault Priority: C
Updater: Sample Entity Client: Sample Entity Client Ref:
Client O/S: AppServer O/S: Server O/S:
Release: 6.2.13 Topic: General Runtime Issu
Tracker Link: No
Status: #47672, Open
Description: Sample contact brief description

Par Details **Contact Details** **Attached Files**

Assignee: Aaron Morgan

Prior Entries:

- 5. 2008/05/28 14:46 (NZT) Jade Support
Converting contact to a PAR for further investigation by the Plant.
- 4. 2008/05/28 14:41 (NZT) Sample Entity
Acutally, I have realised that I do still require your assistance so I am reopening this contact.

New Entry: I have some additional information that may be useful when reproducing this problem.

☐ E-mail response to --> sample@sampleemailaddress.com Cc to -->

Update - Add Conversation **Clear Form For New Contact** **Link to Tracker**

Print/Email/Extract **Quick Print** **Quick E-mail** **Watch**

4. Click the **Update – Add Conversation** button, to update the details. Alternatively, close the form to abandon your entries.

If you have any incorrectly spelled words or unrecognised words, the Check Spelling form is then displayed.

Use this form in the normal manner, to check the spelling of your input.

The Add Conversation Entry form is automatically unloaded on successful update of the new information.

If the Update form is still open, it is automatically updated with the new details displayed on the **Contact Details** sheet. Alternatively, you can open the Update form again by performing another search. For more details, see “[Searching for, Viewing, and Printing a Contact or PAR](#)”, later in this chapter.

Searching for, Viewing, and Printing a Contact or PAR

As a client user, you can search for all of the contacts that you have opened and for all PARs that have been opened by other clients. However, you cannot view contacts for other clients or see the contact details for a PAR that was opened by another client.

This section covers the following topics.

- [Searching for Your Open Contacts and PARs](#)
- [Searching for Other Users' Contacts and PARs](#)
- [Viewing a Contact or PAR](#)
- [Printing a Contact or PAR](#)

Searching for Your Open Contacts and PARs

➤ To search for your open contacts and PARs

- Select the **List My Open Contacts & PARs** command from the Search menu.

Note This automatically selects the appropriate options to list your open contacts and PARs for your default product.

The Search PAR Database form, shown in the following diagram, is then displayed.

Search Parsys Database

Basic Search Criteria | Advanced Search Criteria I (Optional) | Advanced Search Criteria II (Optional) | Advanced Search Criteria III (Optional)

Product: JADE | Keyword Criteria: AND | OR | NOT | Mode: Keywords | Latest | Today Only | Tracker | Keyword(s): | Priority: All | A | B | C | Phase: Contact | Par | Qualification | Documentation | Approval | Type: All | Consulting Request | Contact | Documentation Fault | Fault | New Feature Suggestion | Only FAQs | Status: Open | Pending | Closed | Patched | Search | Defaults | Restore

Product Nbr	*	#	Client	Client Ref Topic	Environment	Priority	Type	Opened	Scheduled	Release	Release	Release	Release	Qualified Client	O/S	AppServer	DbServer	Assign
JADE		47672	Sample Entity	General Runtime Issues <Not Specified>	C	Fault	6.2.13			6.2.13								<unava

View Doc | Update | Print/Extract All | Quick Print | Reopen Contact

Click on a contact that is listed in the table in the lower half of the form, to update or view contact details. For details, see “[Updating a Contact](#)” and “[Viewing a Contact or PAR](#)”, elsewhere in this chapter.

Searching for Other Users’ Contacts and PARs

➤ To search for other users’ contacts and PARs

1. Select the **Advanced Search** command from the Search menu.

The Search Parsys Database form, shown in the following diagram, is then displayed.

This form has three additional sheets, to enable you to perform a more-advanced search, if required.

2. Select the product for which you want to perform a search, in the **Product** combo box.
3. Select the mode of search you want to perform, by clicking the required option button in the Mode group box. Select the:
 - **Keywords** option button, to specify one or more keywords for the search. If you select this option button, you must complete steps 4 and 5 of this instruction.
 - **Latest** option button, to view the 100 most-recent contacts or PARs that match your search criteria. If you select this option button, go to step 6 of this instruction.

- **Today Only** option button, to view the contacts or PARs that match your search criteria and that were updated today. If you select this option button, go to step 6 of this instruction.
- 4. If applicable, select the required keyword mode, by using the option buttons in the Keyword Criteria group box. If you select the:
 - **AND** option button, the contact or PAR must have all of the specified keywords present
 - **OR** option button, the contact or PAR must have at least one of the specified keywords present
 - **NOT** option button, the contact or PAR must contain the first specified keyword and none of the other keywords
- 5. If applicable, enter the keyword (or keywords) for which you want to search.

Tips For **AND** and **OR** searching, partial words are matched.

For **NOT** searching, only the first word uses partial matching. All subsequent words use exact match only.

To search for a specific number, enter the required number preceded by a # character; for example, #12345.

- 6. Select the contact or PAR priorities for which you want to search from the **Priority** list.
- 7. Select the type of contact or PAR for which you want to search, by checking the required check boxes in the Type group box.
- 8. Select the contact or PAR status for which you want to search, by checking the required check box and making a selection in the list box below. You can restrict your search more, by using the **Advanced Search Criteria I**, **Advanced Search Criteria II**, and **Advanced Search Criteria III** sheets.
- 9. To further restrict your search criteria, click on the **Advanced Search Criteria I** tab and then perform the following actions. When you click on the **Advanced Search Criteria I** tab, the **Advanced Search Criteria I**, sheet, shown in the following diagram, is then displayed.

Basic Search Criteria	Advanced Search Criteria I (Optional)	Advanced Search Criteria II (Optional)	Advanced Search Criteria III (Optional)
Client ----- All ----- Sample Entity (SAMPLE)	Client e-mail address (optional) - Sample Entity sample@sampleemailaddress.com	Topic ----- All ----- .NET interface ActiveX Controls & Automation ActiveX Exposure Collections & Iterators Compiler & Language Controls Database Engine	Search Search

- a. To restrict the search to only *your* contacts and PARs, select your client name in the **Client** list box and deselect the **All** option.

- b. To restrict the search to only selected topics, select all the required topics in the **Topic** list box and deselect the **All** option.

You can further restrict the search criteria, by using the optional **Advanced Search Criteria II** sheet on the search form.

- 10. To further restrict your search criteria, click on the **Advanced Search Criteria II** tab and then perform the following actions. When you click on the **Advanced Search Criteria II** tab, the **Advanced Search Criteria II** sheet, shown in the following diagram, is then displayed.

- a. In the **Par reopened at least x times** text box, enter a value greater than zero (**0**) for the number of times the PAR has been reopened.
- b. In the **Has at least x duplicates** text box, enter a value greater than zero (**0**) for the number of duplicate PARs.
- c. Check the **A hot fix was created** check box, to select only PARs for which a hot fix was created.
- d. In the **Assignee** list box, select **Unassigned** to show only unassigned PARs or only PARs assigned to specific developers, by deselecting the **All** option and then selecting the required developers or **Unassigned** options.

You can further restrict the search criteria, by using the optional **Advanced Search Criteria III** sheet on the search form.

- 11. To further restrict your search criteria, click on the **Advanced Search Criteria III** tab and then perform the following actions. When you click on the **Advanced Search Criteria III** tab, the **Advanced Search Criteria III** sheet, shown in the following diagram, is then displayed.

- a. To restrict the search to only selected releases opened, select all of the required opened releases in the **Opened** list box and deselect the **All** option.

- b. To restrict the search to only selected releases scheduled, select all the required scheduled releases in the **Scheduled** list box and deselect the **All** option. (Note that this option applies only to PARs that have been patched.)
- c. To restrict the search to only selected releases that have been closed, select all of the required closed releases in the **Closed** list box and deselect the **All** option.
- d. To restrict the search to selected releases qualified only, select all of the required qualified releases in the **Qualified** list box and deselect the **All** option. (Note that this option applies only to PARs that have been patched.)
- e. In the **Date Range – Opened** fields, enter a **From** date, a **To** date, or both, to filter by date opened.
- f. In the **Date Range – Closed** fields, enter a **From** date, a **To** date, or both, to filter by date opened.

12. Click the **Search** button, to perform the search using your selection criteria.

When the search has completed, the search form is displayed showing the results of your search.

You can display a colour legend, which displays details about the colours assigned to different kinds of contacts and PARs. For details, see “[Viewing the Colour Legend for the PAR Search Forms](#)”, later in this chapter.

Search Parsys Database

Basic Search Criteria

Advanced Search Criteria I (Optional)

Advanced Search Criteria II (Optional)

Advanced Search Criteria III (Optional)

Keyword Criteria

AND OR NOT

Mode

Keywords

Latest

Today Only

Tracker

Keyword

Priority

All

A

B

C

Phase

Contact

Par

Qualification

Documentation

Approval

Type

All

Consulting Request

Contact

Documentation Fault

Fault

New Feature Suggestion

Only FAQs

Status

Open

Pending

Closed

Patched

All

Administrative

Closed With No Patch

Closed, not implemented

Closed, not in product sco

Search

Search

Defaults

Restore

Product Nbr

*

#

Client

Client Ref Topic

Environment

Priority Type

Release Release

Release Release

Release Release

Release Release

JADE

47672

Sample Entity

General Runtime Issues <Not Specified>

C

Fault

6.2.13

View Doc

Update

Print/Extract All

Quick Print

Reopen Contact

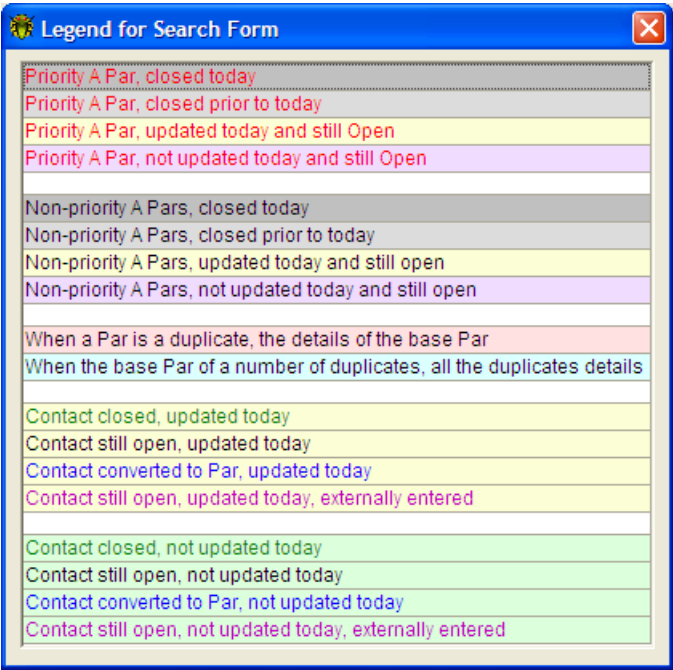
Tip Some words are deliberately excluded from keyword generation because of the frequency with which they can occur (that is, they are *noise* words). If you are performing a keyword search and any of the keywords you entered are noise words, a warning is displayed in red below the **Keyword(s)** text box.

13. Click the required button at the bottom of the form for the action that you want to take next. Click the:
- **View Doc** button, to open the View Document form.
 - **Update** button, to open the Maintain Contact form for a contact or the Add Conversation Entry form for a PAR.
 - **Print/Extract All** button, to open the Print/Email/Extract form, which enables you to request a printout, e-mail, or file extract of all of the results that were returned for this search. For more details, see “[Printing a Contact or PAR](#)”, later in this chapter.

Viewing the Colour Legend for the PAR Search Forms

The contacts that are listed in the table on the PAR Search form are colour-coded to make identification easier.

- **To view the colour legend for the PAR Search forms**
- Right-click on the required contact line and then select the **Legend** command from the popup menu that is displayed. The Legend for Search Form, shown in the following diagram, is then displayed.



Viewing a Contact or PAR

As a client user, you can search for all contacts you have opened and for all PARs that have been opened by other clients.

Note You cannot view contacts for other clients or the contact details for a PAR that was opened by another client.

➤ **To view a contact or PAR**

1. Perform an appropriate search to meet your requirements. For more details, see “[Searching for Other Users’ Contacts and PARs](#)”, earlier in this chapter.
2. Select the contact or PAR whose details you want to view and then perform one of the following actions.
 - ❑ Click the **View Doc** button.
 - ❑ Right-click in the table and then select the **View Document** command from the popup menu that is displayed.

The View Document form, shown in the following diagram, is then displayed.

The screenshot shows a software window titled "Par 47672 (Product=JADE)". The form is divided into several sections. At the top, there are dropdown menus for "Product" (JADE), "Par Type" (Fault), "Priority" (C), "Client" (Sample Entity), "AppServer O/S", "Server O/S", "Release" (6.2.13), and "Topic" (General Runtime Issue). Below these are fields for "Tracker Link" (No), "Status" (#47672, Open), and "Description" (Sample contact brief description). A tabbed interface at the bottom shows "Par Details", "Contact Details" (selected), "Hot Fix Details", "Attached Files", and "Working Set". The "Contact Details" tab displays a list of conversation entries with timestamps and subjects, such as "6. 2008/05/28 15:01 (NZT) Sample Entity" and "5. 2008/05/28 14:46 (NZT) Jade Support". A button "Add Conversation Entry" is located below the list. At the bottom of the window, there are fields for "E-mail response to" (sample@sampleemailaddress.com) and "Cc to", along with navigation buttons like "<< Prior", "Next >>", "Link to Tracker", "Print/Email/Extract", "Quick Print", "Quick E-mail", and "Watch".

Details of your selected contact or PAR are displayed on the form.

Tips The tabs on this form are coloured light blue (and are enabled) if there is information to be displayed on that sheet.

A *working set* is also created with the entire previous search results copied to the working set. This enables easy swapping between the contacts or PARs that matched your sort criteria, as well as freeing up the search form to perform other searches without losing the results of your last search.

4. Depending on the status of your contact, the button below the pane on the **Contact Details** sheet performs one of the following operations.

- If the contact is still open, the **Update Contact** button is displayed, which opens the Maintain Contact form. For details, see “[Updating a Contact](#)”, earlier in this chapter.
- If the contact is closed, the **Reopen Contact** button is displayed, which opens the Reopen Contact form. For details, see “[Reopening a Contact](#)”, earlier in this chapter.
- If the contact has been converted to a PAR, the **Add Conversation** button is displayed, which opens the Add Conversation Entry form. For details, see “[Adding a Conversation Entry](#)”, earlier in this chapter.

5. Use the buttons across the bottom of the form to perform the following functions.

Button	Enables you to...
<< Prior	Move to the prior contact or PAR in the working set.
Next >>	Move to the next contact or PAR in the working set.
Print/Email/Extract	Specify your output options on the Print/Email/Extract form.

Printing a Contact or PAR

As a client user, you can print contacts you have opened and PARs that have been opened by other clients.

Note The printout automatically suppresses the client details and the contact details for contacts that were opened by other clients.

➤ To print a contact or PAR

1. Select the contact or PAR that you want to print. For details, see “[Searching for Other Users’ Contacts and PARs](#)” earlier in this chapter.
2. Perform one of the following actions.
 - If you want to print, e-mail, or extract *all* of the documents returned by your search, click the **Print/Extract All** button on the Search form.
 - If you want to print, e-mail, or extract a specific document, open the View form for that document and then click the **Print/Email/Extract** button (on the View form). For more details, see “[Viewing a Contact or PAR](#)” earlier in this chapter.

The Print/Email/Extract form, shown in the following diagram, is then displayed, enabling you to select the options you want included in your output.

Please select required output

Print/Extract/Email options

Intended audience for output

☒ External Use

Report Format

☒ Brief ☐ Concise ☐ Full

Include in report

☒ Brief Description

☐ Par Details

☐ Interim Response

☐ Formal Reply

☐ FAQ Details

☐ Contact Details ☐ Support Notes

☐ Dialogue Details

Output type

☒ Print ☐ Email ☐ File

Print Options

☒ Print Preview ☐ Choose Printer

Details of output source (prepended to report/email/file)

Specific details for document #47672

Print Print & Close

Note As a client user, you can select the **External Use** format only, which is automatically selected by default.

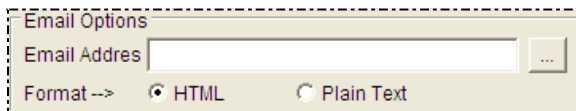
3. In the Report Format group box, select the required option button; that is, **Brief**, **Concise**, or **Full**. Alternatively, you can select your own options for what to include in the report, by selecting the appropriate option buttons in the Include in report group box, as follows.
 - **Brief Description**, which includes the brief description of the contact or PAR in the report output.
 - **Par Details**, which includes the detailed description of the PAR in the report output.
 - **Interim Response**, which includes the interim response for the PAR in the output.

- **Formal Reply**, which includes the formal reply for the PAR in the output.
 - **Contact Details**, which includes the Conversation Entries for the contact in the output. This is automatically suppressed if the contact was not opened by you.
4. Select the **Print**, **Email**, or **File** option button, to specify the required type of output. The **Print** option is the default option.

Note The option buttons that you select determine the appearance of the Print Options group box and the buttons that are displayed at the bottom of the form.

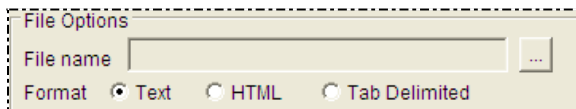
- If you select the **Print** option button, you can choose whether or not to preview the output. To view a preview of the report, check the **Print Preview** check box.
- If you select the **Email** option button, you can enter the e-mail address to which to deliver the output and select the format of the e-mail message you want to receive.

The following diagram shows the fields that are displayed in the Print Options group box when you select the **Email** option button.



- If you select the **File** option button, you can use the browse button (indicated by the ... points of ellipsis) to select the file to create and the format of output you want to create.

The following diagram shows the fields that are displayed in the Print Options group box when you select the **File** option button.



5. When you have selected your required output type, click the required button at the bottom of the form.

If the required report is output as:

- A printed document, click the **Print** or **Print & Close** button, to produce the print output and optionally close the dialog on completion.
- An e-mail message, click the **Email** or **Email & Close** button, to produce the e-mail message and optionally close the dialog on completion.
- A file, click the **Write File** or **Write File & Close** button, to produce the file and optionally close the dialog on completion.

Alternatively, close the form to cancel the output request and unload the Print/Email/Extract form.

Appendix A

Technical Administration

This appendix covers the following topics.

- [Installing the Parsys Application](#)
 - [Uninstalling JADE Thin Client and Parsys Application Software](#)
- [Automatically Upgrading Software](#)
- [Technical Overview](#)
 - [TCP/IP Port Numbers](#)
 - [Firewall and Internet Security](#)
- [Troubleshooting](#)
 - [Presentation Clients Cannot Connect to the Application Server](#)
 - [Location of the JADE Initialisation File](#)

Installing the Parsys Application

Your contact person in the Jade Software Corporation Limited supplier company provides you with the Parsys **InstallShield** package (for example, as an e-mail attachment), which downloads and installs Parsys on your workstation and that of other users within your client company.

The Parsys **InstallShield** package installs the JADE smart thin client (or JADE thin client) software and the Parsys application on to a presentation client workstation and configures it to connect to the managed server on which the Parsys database is located.

You can then access the Parsys application on the managed server over a remote network connection (for example, from the Internet) by using a secure port.

Note You should exit from all Windows programs before you install the JADE thin client and Parsys application software, to avoid any sharing violations.

You can run the **InstallShield** program directly, by opening it rather than saving it to disk when you are prompted to do so by the File Download message box.

The installation process proceeds in stages, as follows.

1. Initialises the **jade.exe** InstallShield program and then displays the Parsys Setup window.
2. Displays the Welcome form, which welcomes you to the installation program.

To continue the installation, click the **Next >** button. Alternatively, click the **Cancel** button to exit from the set-up process. If you click the **Cancel** button, the set-up program is closed. After closing any conflicting applications, you can then restart the **jade.exe** set-up program.
3. Enables you to select the destination location of the Parsys files, which are located by default in the **C:\Program Files\Jade Software Corporation\Parsys** directory on your presentation client workstation.

To continue the installation, click the **Next >** button. Alternatively, click the **Browse** button if you want to select another folder in which to install the Parsys software or click the **Cancel** button to exit from the set-up process.
4. Runs the installation program and starts copying files.

A progress bar is displayed as the files are copied and the software is installed.
5. Displays the Setup Complete form, which informs you when the installation of the JADE thin client and Parsys application software is complete.

To complete the set-up process, click the **Finish** button in the Setup Complete form.

The Setup Complete form and the Setup window are then closed, and the **Parsys** icon is placed on your desktop.

When the software has been installed, you can then initiate the Parsys application.



For details about:

- Initiating the Parsys application, see “[Signing On to the Parsys Application](#)”, in Chapter 1.
- Upgrading software on presentation clients, see “[Automatically Upgrading Software](#)”, later in this appendix.
- Problems when connecting to Parsys on the managed server over a remote connection, see “[Troubleshooting](#)”, later in this appendix.

Uninstalling JADE Thin Client and Parsys Application Software

➤ To remove the JADE thin client and Parsys application software from your workstation

1. Double-click the **Add/Remove Programs** icon in the Windows Control Panel.
The Add/Remove Programs Properties form is then displayed.
2. Select the **PARSYS Web - cnwpucf** application from the list of installed software programs that Windows can automatically remove.
3. Click the **Add/Remove** button.
The Confirm File Deletion message box is then displayed, prompting you to confirm that you want to completely remove the Parsys application and all of its components.
4. Click the **Yes** button. Alternatively, click the **No** button to abandon the software removal and return to the Add/Remove Programs Properties form.

The **UnInstallShield** program is then initiated, which removes the JADE thin client and Parsys application software from your workstation and the Parsys application icon from your desktop.

Automatically Upgrading Software

On an infrequent basis, the JADE thin client and Parsys application software will need to be updated. The software that is installed on each presentation client workstation detects when software on the managed server that contains the Parsys database has been updated.

When you connect to the managed server, a comparison of the software versions is performed and one of the following actions is performed.

- If there is a mismatch of any module when you initiate Parsys, the Thin Client Download form advises you that a new version of the thin client software must be downloaded to complete the request to initiate a Parsys work session.

When you confirm that you want to proceed, the software is automatically downloaded from the server and the Smart Thin Client Download Install window is displayed.

- If the versions of software on the managed server and the presentation client match or if the maximum number of downloads that is allowed is already in progress, the software download does not occur and the initiation of the Parsys application continues as normal.

All installation operations are logged in the **download.log** file in the **parsys\c_bin** directory on your presentation client workstation.

If any file fails to copy, a message box advises you of this and prompts you to abort or retry the installation operation. If you:

- Abort the operation, the installation restores the appropriate files using the backup copy that it created previously and it then terminates.
- Retry the operation, another attempt is made on the file operation, allowing you to deal with issues such as lack of available disk space.

If you experience any difficulty with the automatic upgrade to a new version of software, you should be able to download the new software from the medium on which it was supplied (for example, from an e-mail attachment or a CD-ROM) to reinstall the software. For details, see [“Installing the Parsys Application”](#), earlier in this appendix.

Technical Overview

The JADE smart thin client mode in which the Parsys application runs moves most of the processing requirement from the presentation client workstation to the managed server that contains the database, reducing the amount of data that must be communicated and enabling the application to run over Intranets, dial-up lines, and the World Wide Web.

The application logic (programs, or code) is executed on the application server and the only interaction with the presentation client is to notify the client of any Graphical User Interface (GUI) changes and to request information that is available only from that client. This enables the software to have a smaller operational “footprint” on a presentation client workstation in terms of the required:

- Resource (memory and disk)
- Minimum workstation configuration
- LAN or WAN requirement is significantly reduced

Like most modern software, the JADE thin client uses Transmission Control Protocol / Internet Protocol (TCP/IP) for communications. This enables it to be used across most networks including the most common of all: the Internet.

To use the Internet, the JADE thin client software that is installed on the presentation client workstations has a specific TCP/IP host address or IP address and TCP/IP port number embedded within it. This uniquely identifies the JADE system with which it is to communicate.

TCP/IP Port Numbers

Many people consider the Internet to consist only of the World Wide Web (WWW); that is, of Web sites that are viewed by using Web browsers such as Microsoft's Internet Explorer or by Netscape Communicator.

Web browsers use the HyperText Transport Protocol (HTTP) protocol and communicate over TCP/IP port number **80** by default. There are also other common WWW protocols such as the secure HyperText Transport Protocol (HTTPS) that uses port number **443** by default. These well-known port numbers are therefore usually ‘open’ through whatever network infrastructure a remote site may be using to access the Internet.

As security is of increasing importance on the Internet, most commercial organisations have routers, firewalls, or other software (for example, Black Ice Defender, Microsoft Proxy Server, or Wingate) that can be set up to deny TCP/IP access across the Internet to ports other than those that are commonly required.

When applications run in JADE thin client mode, the presentation client uses port **443** for communication to the application server. This port is used for communication for a number of reasons, as follows.

- By default, most firewalls, proxy servers, and so on, are set up to allow this port through without much specific checking and without caching.
- It is the standard port for encrypted traffic.
- It allows for relatively simple checking for access through firewalls, and so on. If a presentation client can browse to a number of secure Web sites using HTTPS (which also uses port 443), you can normally assume there is nothing in the way preventing access to the application server in JADE thin client mode.
- Use of this port still allows restriction within firewalls, and so on. If your network administrator does not want to allow global access out using port 443, it can be restricted by the source and destination IP address.

In some situations this may not be allowed, in which case this port must be specifically opened. Examples of this are where your network:

- Does not allow browsing secure sites on the Internet.
- Allows restricted access to sites on the Internet.

Firewall and Internet Security

If your organisation has installed a firewall between your workstation and the Internet, this can require special set-up for the JADE thin client. The ideal type of firewall for use with JADE thin client software is one that is transparent; that is, one that makes it appear to the client software that it is directly connected to the Internet.

Another type of firewall uses a communication protocol called *socks*. As the JADE thin client does not currently support access to the Internet through this type of firewall, additional software needs to be installed on a workstation to allow access to the Internet. You must contact your network provider or administrator for the necessary add-on software that support **socks** at the network stack level.

The other major type of firewall is the proxy. Proxies come in a wide variety of functionality. Highly functional ones like Microsoft Proxy Server implement additional security features such as authentication and redirection for load balancing. The JADE thin client currently does not directly support redirection requiring any client action, and requires additional support software such as the Microsoft Proxy Client installed on the workstation. The proxy server does not support the following as part of HTTP/1.0.

- The **CONNECT** command
- The Basic or Windows NT LAN Manager (NTLM)

Troubleshooting

This section covers problems that may occur when you try to access the Parsys application running on the managed server.

Presentation Clients Cannot Connect to the Application Server

If your presentation client does not work after it has been configured, perform the following actions to resolve any connectivity issues, as appropriate.

1. Attempt to connect to one of the following sites using your normal Web browser.

- <https://www.jadeworld.com/bin/jadehttp.dll?JWS&n=parinquiry>
- <https://fnc.asbbank.co.nz>
- <http://www.google.com/>

If you cannot connect to any of these sites using your normal Web browser, perform the action described in step 13. When the condition described in step 13 is resolved, restart the diagnostic process from this step (that is, step 1).

Note The network name that JADE uses to connect to the proxy must be resolvable to an Internet Protocol (IP) address by using either a Domain Name Server (DNS) or a local *host* file. Consequently, the network name must not contain any prefixes (for example, **https://**).

2. Request the actual proxy host name and port number settings for your LAN from your network administrator and then record these values in the following line.

Host name=_____ Port number=_____

3. Modify the initialisation file (**cnwpucf.ini**, by default) for the Parsys application to reflect your host name (that is, the network name or Internet Protocol (IP) address of the proxy host) and port number of the proxy host.

- a. Right-click on the Parsys application icon on your desktop.
- b. Select the **Properties** command from the popup menu that is then displayed and then click the tab of the **Shortcut** sheet on the Properties form that is displayed.
- c. From the **Target** text box (that is, the command line), identify and record in the following space the path of the initialisation file specified in the **ini=** parameter (for example, **ini=c:\Program Files\Jade Software Corporation\Parsys\c_bin\cnwpucf.ini**).

Initialisation file path=_____

See also “[Location of the JADE Initialisation File](#)”, later in this appendix.

- d. Initiate Windows Explorer (or File Manager, should you prefer), navigate to the directory you identified in step c, and then double-click on the **.ini** file.

Your initialisation file is then displayed in a text editor (for example, Notepad).

- e. Locate the [JadeThinClient] section, and then specify the following parameters on individual lines, using the values that you recorded in step 2.

```
SSLProxyHost=network-name or proxy-host-IP-address  
SSLProxyPort=proxy-host-port-number or proxy-host-port-name
```
 - f. Save and then close your initialisation file.
 - g. Start your JADE thin client Parsys application, by double-clicking on the application icon on your desktop.
4. If you are still unable to access the Parsys application in JADE thin client mode and you are running Microsoft Proxy Server, you may have to install Microsoft Proxy Client on your desktop.

Arrange for your network administrator to install Microsoft Proxy Client on your desktop.

Caution During this installation, consideration must be given to other proxy settings that could be impacted by installing Microsoft Proxy Client and programs that might be impacted by any proxy changes.

5. If you are still unable to access the Parsys application in JADE thin client mode and you are running some other form of proxy server, your desktop might require changes.
- Arrange for your network administrator to review the proxy requirements and apply any changes that will enable the JADE thin client to communicate with the application using the Secure Sockets Layer (SSL) setting that you have declared in the initialisation file. (For more details, see step 3.)
6. If the JADE thin client is still not working at this point, your network administrator should review the process documented in this section and attempt to identify what could be blocking the connectivity, for example:
- Is port 443 open on the client router?
 - Does the host name resolve to the correct TCP/IP addresses and is it accessible?
 - Does the proxy server require user code and password authentication?
7. Bearing in mind that it is your responsibility to correctly set up and configure your proxy server, other points to consider are:
- The default settings may timeout an SSL connection if it has been inactive for approximately two minutes.

You can increase the value of the **DWORD** registry setting (that is, HKLM\System\ControlSet001\Services\W3Proxy\Parameters\SocketIoTimeoutSecs) to a value larger than the value of the **KeepAliveTime** parameter in the [JadeAppServer] section of the JADE initialisation file on the application server, which is specified in minutes.

As the application server sends an *'are you there'* type message to every presentation client each time the specified interval elapses, if the proxy server **SocketIoTimeoutSecs** parameter value is larger than the value of the **KeepAliveTime** parameter, the connection should stay up indefinitely.

Note The proxy server **SocketIoTimeoutSecs** parameter value is specified in seconds and the **KeepAliveTime** parameter value is specified in minutes.

- The proxy server logging feature does reverse lookups on the IP address of the presentation client and application server. If the proxy server cannot resolve these IP addresses, the start-up time for the presentation client could be as long as one to two minutes and the presentation client expects to connect within 45 seconds. If the presentation client cannot do this, it raises an exception.

You must ensure that the IP addresses used can be resolved to host names. Alternatively, you can turn this feature off. You can use DNS or host files to achieve the reverse lookup, as required.

The two points to consider listed in this step were located using the Microsoft Proxy version 2 on a workstation running under Windows 2000 Advanced Server.

Location of the JADE Initialisation File

Ensure that the command line for the JADE thin client Parsys application on each presentation client includes the **ini=** parameter. (The Parsys **InstallShield** program sets this parameter automatically.)

To check this:

1. Select the **Properties** command from the popup menu that is displayed when you right-click on the Parsys application icon on the desktop.
2. Click the tab of the **Shortcut** sheet on the Properties form that is then displayed.
3. In the **Target** text box, ensure that the correct initialisation file and a valid path are specified in the **ini=** parameter (for example, **ini=c:\program files\Jade Software Corporation\Parsys\c_bin\cnwpucf.ini**).

Caution When SSL security is enabled, do *not* use the JADE default action of the presentation clients using the initialisation file in the binary directory.

When running a JADE application, the JADE initialisation file is usually specified on the command line. If a JADE initialisation file is not specified, JADE attempts to use the **jade.ini** file in the installation directory of **jade.exe** (that is, the **bin** directory) on the presentation client node.

Caution When running JADE thin client applications in multiuser mode, ensure that the TCP/IP port number specified in the **jadapp.exe** command line **AppServerPort** parameter is a different port number to that specified for the database server (for example, the **jadrap.exe** JADE Remote Node Access program).

If you have problems getting a presentation client to work after the JADE and Parsys application software has first been installed, the specified host address or the specified port number may not be visible from the presentation client workstation across the Internet. There could be a number of reasons for such a problem.

As the components and set-up of the computer network and Internet access are unique to each site, it will require investigation by your network support staff or by the supplier of the computer.

To determine the application server host address and port number that the presentation client attempts to communicate with after the installation of the JADE thin client and Parsys application software, the user of the presentation client workstation performs the following actions.

1. Right-click on the **Parsys** icon that is placed on your desktop during the installation process.
2. Select the **Properties** command from the popup menu that is then displayed.
The Parsys Properties form is then displayed.
3. Click on the **Shortcut** tab, to display the **Shortcut** sheet.
4. Click on the **Target** text box, locate and record the text **appServer=**, and then the text **appServerPort=**. The text that immediately follows the equals signs (=) is the host address and TCP/IP port number, respectively.

Index

A

- Add New Contact form, 22
- Advanced Search Criteria I tab, 36
- Advanced Search Criteria II tab, 37
- application server overview, 47
- applications
 - closing conflicting, 45
 - JADE thin client, 47
 - signing off, 11
- automatic software upgrade, 46

C

- Check Spelling form, 25
- Client menu, 14
- client nodes
 - JADE thin, 47
 - presentation, 47
- closing a contact, 27
- colour legend for contacts and PARs, 39
- Colour legend for Search form, 39
- command
 - Exit, 11
 - Logoff, 11
- configuration
 - using JADE thin clients to improve, 47
- contacts
 - adding, 22
 - adding a conversation entry, 31
 - adding conversation entries, 25
 - closing, 27
 - colour legend, 39
 - overview, 22
 - phases of, 19
 - printing, 41
 - reopening, 29
 - searching for, 34
 - searching for your open, 34
 - updating, 25
 - viewing, 40

- conversation entries
 - adding a conversation entry adding to a PAR, 31
 - adding to a contact, 25, 31

D

- database
 - storing loaded form version, 47
- dialup lines
 - accessing Parsys, 47
- disk usage
 - using JADE thin clients to improve, 47

E

- executable program
 - jade, 51
- Exit command, 11

F

- File menu, 14
- forms
 - Add New Contact, 22
 - Check Spelling, 25
 - Colour legend for Search, 39
 - Maintain Contact, 25
 - Print/Email/Extract, 42
 - Reopen Contact, 30
 - Search PAR Database, 25-31, 34-35
 - storing loaded version, 47
 - View Contact, 29-31
 - View Document, 40
- function keys navigation, 16

H

- Help menu, 15

I

- initialisation file, 51
- installation
 - Parsys, 45
- interface
 - JADE thin client, 47

J

- JADE thin client
 - overview, 47
 - uninstalling, 46
 - updating, 46
- jade.exe program, 51

K

- keyboard
 - perform functions using, 16
- keys
 - navigate using function, 16
 - navigate using shortcut, 16

L

- licences
 - confirming agreement terms, 45
- lines
 - accessing Parsys over dialup, 47
- Logoff command, 11

M

- Maintain Contact form, 25
- menus
 - Client, 14
 - File, 14
 - Help, 15
 - navigate using, 13
 - Window, 15
- mode
 - JADE thin client, 47

N

- navigation
 - Parsys, 12-13, 16
- nodes
 - application server, 47
 - presentation client, 47

O

- opening a contact, 22

P

- PARs
 - adding a conversation entry, 31
 - colour legend, 39
 - printing, 41
 - searching for, 34
 - searching for your open, 34
 - viewing, 40
- Parsys
 - applying a skin, 17
 - changing your password, 11
 - displaying version information, 20
 - getting started, 8
 - initialisation file, 51
 - installing, 45
 - logging off, 11
 - navigating around, 12-13, 16
 - overview, 9
 - setting up, 45
 - signing off, 11
 - signing on, 9-10
 - starting the application, 10
 - uninstalling, 46
 - updating, 46
 - upgrading, 46
 - using, 12, 16
- password
 - changing, 11
 - specifying, 10
- phases of a contact, 19
- presentation client overview, 47
- Print/Email/Extract form, 42
- printing
 - contacts, 41
 - PARs, 41
- programs
 - closing running Windows, 45
 - jade.exe, 51

R

- Reopen Contact form, 30
- reopening a contact, 29
- resource
 - using JADE thin clients to improve, 47

S

- Search PAR Database form, 25-31, 34-35
- searching for contacts and PARs, 34
- server nodes
 - application, 47
 - JADE thin, 47
- shortcut keys
 - navigate using, 16
- signing off from Parsys, 11
- signing on to Parsys, 9
- skins
 - changing, 17
- smart thin client. See JADE thin client
- software
 - automatically upgrading, 46

T

- thin clients
 - support for Parsys, 47

U

- uninstalling Parsys, 46
- user identifiers, 10

V

- View Contact form, 29-31
- View Document form, 40

W

- Wide Area Network (WAN)
 - running JADE thin client, 47
- Window menu, 15
- workstations
 - Web browser, 47
- World Wide Web (WWW)
 - accessing JADE thin clients, 47