Comindware® Tracker®

Administrator's Guide

Publication Date: 05-09-2013

Contents

About this guide

This guide is intended for system administrators, responsible for installing, configuring, and managing system software, and team managers, responsible for configuring the work environment.

Chapter 1

Before You Begin

This chapter includes the following topics:

Who Can Configure Comindware Tracker

Comindware Tracker configuration is performed by users who have Comindware administrator or Comindware architect privileges.

<table>
<tr><th>Name</th><th>Default privilege level</th></tr>
<tr><td>Comindware administrators</td><td>have full control over Comindware applications. Generally Comindware administrator privileges are granted to a system administrator. Administrator-specific functions include:
Comindware Tracker installation,
performing post-installation setup,
managing local users and local user groups,
connecting Comindware Tracker to Active Directory,
connecting to incoming and outgoing mail servers,
creating backups of the Comindware database,
adding a custom company logo.
Comindware administrators also have full architect privileges.</td></tr>
<tr><td>Comindware architects</td><td>perform setup of the work environment. Generally Comindware architect privileges are granted to team managers. Architect-specific functions include:
creating and modifying workspaces,
creating and modifying applications,
creating and modifying workflows.</td></tr>
</table>

The first Comindware administrator account is created during the Comindware Tracker installation procedure. Later the Comindware administrator assigns the administrator and architect privileges to other users by adding the users into the Administrators of Architect user groups. See Editing user group membership 25.

Opening Comindware Tracker

To configure Comindware Tracker you need to connect to Comindware Tracker using Comindware administrator or Comindware architect credentials. Minimum screen resolution should be 1024 X 768 pixels.

To open Comindware Tracker:

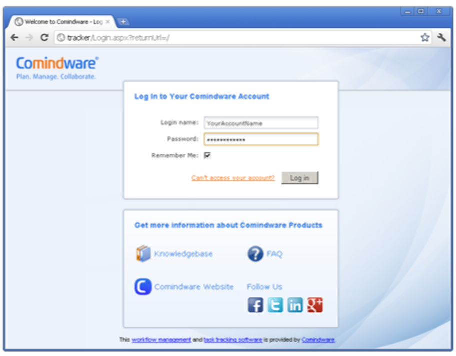
1. Open the web browser.
2. In the address bar of your web browser, type the Comindware Tracker URL:

   http://ComputerName:Port, where:

Parameter	Description	Values
http://	data transfer protocol specified during installation	http:// https://
ComputerName	the name of the server hosting your application. This may be a computer IP address, or a computer DNS name.	localhost 127.0.0.1 LocalComputerName RemoteComputerName
Port	the port number specified during installation	8081 (default for Comindware Tracker installation) 80 (default for http installation) 443 (default for https installation)

Example: http://localhost, http://127.0.0.1, http://mylaptoppc, https://bugtracker:8081

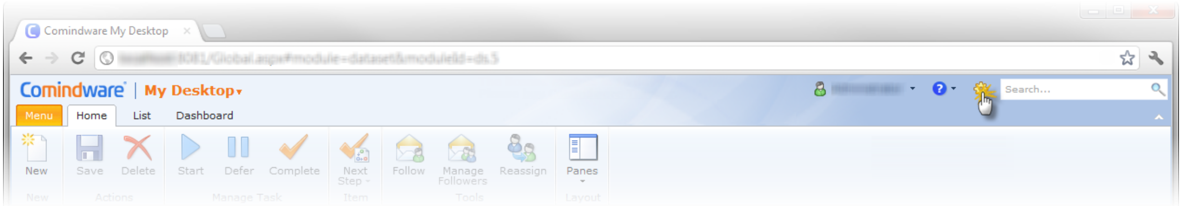
3. On the login page, enter the Comindware administrator login credentials and click the **Log In** button.



The login page

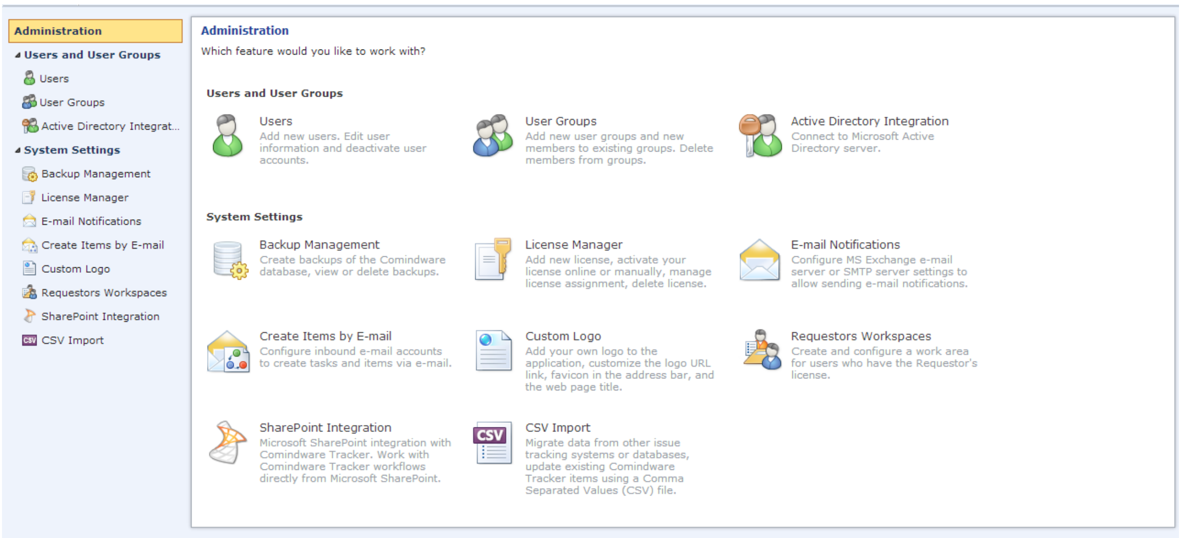
Exploring The Administration Area

After you log in, go to the Administration page by clicking the Administration icon located to the left of the search box in the program header:



Navigating to the Administration page

After you click the Administration icon, you will be redirected to the Administration page:



The Administration page

From the Administration page you configure Comindware Tracker using the following tools:

System settings setup tools:	
Backup Management	Create backups of the Comindware database, view or delete backups. See Backing up the Comindware database 55
License Manager	Add a new license, activate your license online or manually, manage license assignment, delete a license. See Managing licenses 13
E-mail Notifications	Configure MS Exchange or SMTP server settings to allow sending e-mail notifications. See Configuring outgoing e-mail settings 36
Create Items by E-mail	Configure e-mail accounts to create tasks and items via e-mail. See Configuring Comindware Tracker to create items from e-mails 41
Custom Logo	Add your company logo into Comindware Tracker, add a favicon in the address bar of your browser. See Adding a custom logo 48
Requestor Workspaces	Create a work area for users who own the Comindware Tracker Requestor license. Requestors can only create items of a particular type and view items created by them. See Creating Requestor workspaces 31
Comindware Workflow for SharePoint	Integration of Microsoft SharePoint with Comindware Tracker. Work with Comindware Tracker workflows directly from Microsoft SharePoint. See Comindware Workflow for SharePoint 67
CSV Import	Migrate data from other issue tracking systems or databases, update existing Comindware Tracker items using a Comma Separated Values (CSV) file. See CSV Import 63
User management tools:	
Users	Add new user accounts, edit user information, deactivate user accounts. Manage privileges assigned to users.

		See Managing local users [22]
	User groups	Add new user groups and new members to existing groups. Manage group members, manage group privileges. Manage Comindware administrators and Comindware architects groups. See Managing local user groups [24]
	Active Directory Integration	Connect to the Microsoft Active Directory server, import user profile information. See Connecting to Active Directory [27]

Chapter 2

Managing Product Licenses

This chapter includes the following topics:

Prerequisites

Who can perform license management

Comindware administrators

Preliminary steps

No preliminary steps required to perform actions with licenses.

Comindware License Types

Comindware Tracker can be purchased as an on-premise software or as a cloud subscription based service.

To obtain any type of on-premise license or cloud subscription, you need to register an account on the Comindware web site at http://www.comindware.com and receive a product key from your account.

On-Premises Licenses

To use the on-premises version of Comindware Tracker, you will need at least one Comindware Tracker Full license and (optionally) Comindware Tracker Requestor license.

Comindware Tracker Full License

Comindware Tracker Full License provides unlimited access to all features and capabilities of Comindware Tracker, including working with tasks, workflows, collaborative features, reports and dashboards.

Comindware Tracker Requestor License

Comindware Tracker Requestor License provides limited access to Comindware Tracker features and capabilities. This type of license is designed for those users who submit requests like Purchase Requests, IT Help Desk Tickets, Vacation Requests, etc. and need to track their request progress.

Difference Between Full License and Requestor License

Actions	Full License	Requestor License
Submit requests	•	•
Collaborate on requests	•	•
Get status notifications	•	•
Manage requests submitted by other users	•	•
Manage tasks	•	-
Design workflow processes	•	-
Configure personal Workspace (the My Desktop area)	•	-
Real-time monitoring with dashboards and lists	•	-

Actions	Full License	Requestor License
Use Comindware Tasks for Outlook	•	-
Team collaboration	•	-

Comindware Tracker Trial License

The Comindware Tracker trial license allows you to evaluate the full functionality of Comindware Tracker for free during a 30 day trial period. You can also use the trial cloud based subscription service to evaluate Comindware Tracker. Trial subscription is free and is valid for 30 days.

Comindware Cloud Service Subscriptions

Comindware Tracker can be used as a Cloud subscription-based service. Cloud service provides exactly the same functionality as on-premises Comindware Tracker installation.

Trial Subscription

You can evaluate the full functionality of Comindware Tracker for free during a 30 day trial period. Once your trial period is over, the Comindware Tracker features will be locked, but your data will be kept within 2 weeks. If you do not purchase the Full license or subscription within a trial period or after two weeks after the trial period is over, your data will be deleted.

Full Subscription

Comindware Cloud Service Full Subscription is available for one month and for one year. You can purchase the subscription at: http://www.comindware.com/buy/.

Upgrading from trial subscription to full license or full subscription

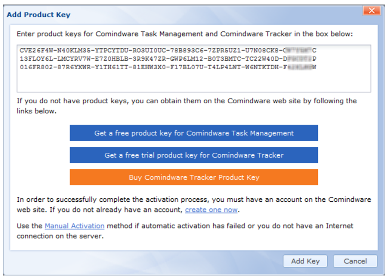
When the trial subscription is over, you can purchase either full subscription and continue using Comindware as a cloud-based service, or purchase the Comindware Tracker Full license for on-premises Comindware Tracker installation. If you choose a cloud-based service, your data created during the trial period will be seamlessly migrated to your full subscription. If you choose the on-premises installation, you will need to contact the Comindware support team to migrate your cloud data to the on-premises installation.

Entering Product Keys And Activating The Product

After installation of Comindware Tracker, you need to enter a product key. As soon as you enter your product key, Comindware Tracker will automatically be activated on the Comindware web site. Before activation, make sure an Internet connection is established and you've already registered an account on the Comindware web site at http://www.comindware.com/my-account.

To add a product key and activate Comindware Tracker:

1. Open **Administration > License Manager.**
2. Click the **Add Product Key** button.
3. Enter your 64-digit product key. You can enter several product keys at once delimited by the <Enter> key.
4. Click **Activate.**



Adding product keys

After the keys are added, you might need to refresh the page to update the information by pressing F5.

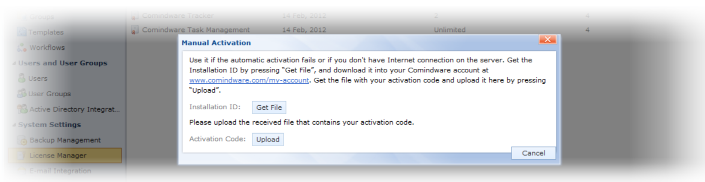
Product keys are language specific. You will not be able to add a product key for another language if you have already entered a product key.

Manual activation

You can use manual activation if the automatic activation fails or if you don't have an Internet connection on the server.

To manually activate the product:

1. Open **Administration > License Manager.**
2. Click the **Add Product Key** button.
3. Click on the **Manual Activation** link.
4. Retrieve the Installation ID file by clicking **Get File.** Save the file to your computer (default file name: ActivationRequest.txt).



Manual Activation

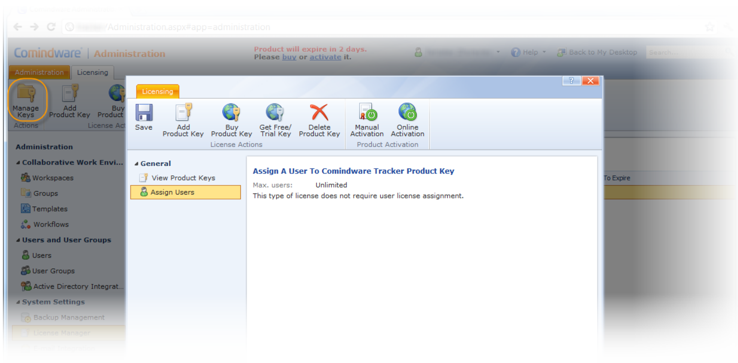
5. Open your Comindware account on the Comindware web site at http://www.comindware.com/my-account/, and upload the Installation ID file.
6. Get the file with your activation code from your Comindware account (default file name: ActivationResponse.txt).
7. Click the **Upload** button in the **Manual Activation** window to upload the file containing your activation code.

Assigning Users To The Product Key

Each Comindware Tracker product key should be assigned to one or more users.

To assign users to a product key:

1. Open **Administration > License Manager.**
2. Select the Comindware Tracker product key you want to assign.
3. Click **Manage Keys.**
4. Click **Assign Users** in the left part of the window.
5. Select the user who will be assigned to this product key.
6. Click **Save.**



Assigning users to the product key

Chapter 3

Managing Users And User Groups

This chapter includes the following topics:

Prerequisites

Who can perform this operation

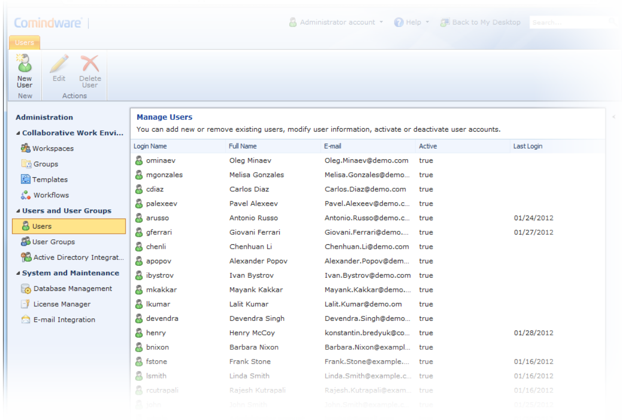
Comindware administrators

Preliminary steps

- Comindware Tracker Full license added

Managing Local Users

Comindware Tracker keeps users and user groups' information on its own account information database. You can manage users and user groups directly in Comindware Tracker or update with user accounts and groups of an LDAP-based directory server in a domain, for example, Active Directory. You can use the mixed mode: some users can be taken from Active Directory, some users can be created locally.



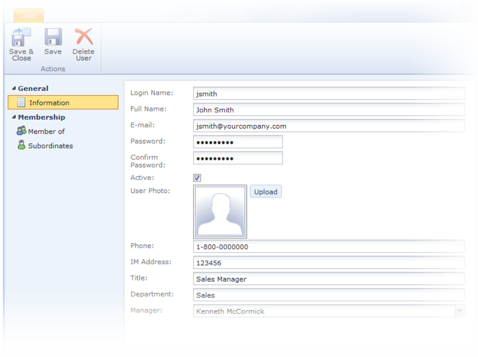
List of users

Creating a Local User

Use local authentication if your company does not use Microsoft Active Directory server, or if you want to give access to an external user who does not belong to your corporate domain.

To create a local user:

1. Go to **Administration** > **Users.**
2. Click **New User** in the Ribbon.
3. In the **Login Name** and **Password** fields, provide user credentials, required for logging into Comindware Tracker.
4. Enter user details: full name, e-mail, IM addresses, mobile and business phone numbers, and other required information.
5. Select the **External user** check box if your Comindware Tracker is connected to Active Directory and the user being added is not a member of a domain and is not included into Active Directory.
6. In the **Membership** section, include a user into one or more user groups, or add subordinates.
7. Click **Save.**



User Information

Adding a Local User Into a User Group

When a user is created, they can be added into one or more user groups. Membership in a user group does not affect user roles and the set of permissions, unless the user is included into Comindware administrators and Comindware architects groups.

Adding into user groups is performed by Comindware administrators.

To add one or more users into a user group:

1. Go to **Administration** > **Users.**
2. Double-click on the user, then click **Member Of.**
3. Select one or more groups where you want to add the user.
4. Click **Save & Close.**

Deactivating a Local User

Deactivating a user means that a user will not be able to log in, though their personal information and all their activities, files, history, and other information will be kept in the system. At any moment you can reverse this change and reactivate the user account.

To deactivate a local user, go to **Administration** > **Users**, select a user and clear the **Active** check box.

Deleting a User

Deleting a local user will delete the user account information. User information in tasks and items related to the deleted user will be shown as Name.Surname (Deleted). However, the administrator will be able to create a new user with such a login name.

To delete a local user, go to **Administration** > **Users**, select the user and click the **Delete User** button.

Managing Local User Groups

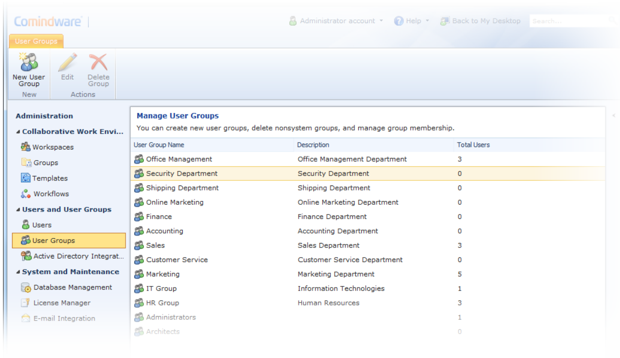
Users can be organized into user groups. Organizing users into user groups facilitates the management of multiple users. User groups allow you to assign equal privileges to a group of users. Each user can belong to several user groups. Besides users, you can add user groups into other user groups. When a user group is added into another one, it inherits the privileges of its parent group. You can only limit subgroup privileges, but you cannot assign extra privileges that do not belong to a parent group.

Default User Groups

The following table shows default user groups and their privileges:

Name	Default Privilege Level
Administrators	have full control over Comindware applications. Administrator-specific functions include product installation and performing post-installation setup: • managing local users and local user groups, • connecting Comindware Tracker to Active Directory, • connecting to incoming and outgoing mail servers, • creating backups of the Comindware database, • adding a custom company logo. Comindware administrators also have full architects privileges.
Architects	perform setup of the work environment: create workspaces, applications, create and modify workflows.

Default user groups cannot be deleted.



User groups

Creating a User Group

To create a user group:

1. Go to **Administration** > **User Groups.**
2. Click **New user group** in the Ribbon.

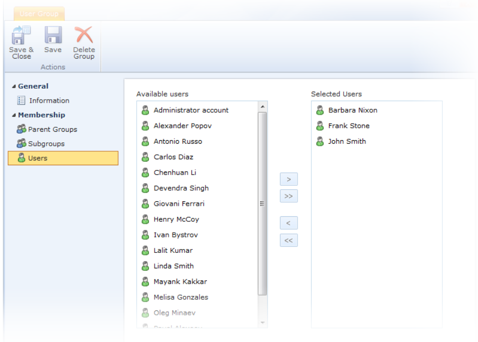
3. Provide a name and a description for the user group.
4. In the **Membership** section, select one of the following: **Parent Groups**, **Subgroups**, or **Users.**
5. Select a user/user group to be added to, or removed from the group. To select multiple users and groups, hold down the control key as you click users or groups. Use the **Add** and **Add All** buttons to add users/groups from the **Available users and groups** box, and the **Remove** and **Remove All** buttons to remove the selected users/groups from the **Group Members** box.
6. When finished, click **Save & Close**.

Editing User Group Membership

You can add extra users and user groups to an existing user group, or remove them. For example, you can assign Comindware administrator or Comindware architect privileges to users who will perform configuration of the work environment by adding them into the Administrators or Architects group.

To edit membership:

1. Go to **Administration** > **User groups.**
2. Click on the user group you want to modify.
3. In the **Membership** section, select **Parent Groups**, **Subgroups**, or **Users.**
4. Select a user/user group to be added to, or removed from the group. To select multiple users and groups, hold down the control key as you click users or groups. Use the **Add** and **Add All** buttons to add users/groups from the **Available users and groups** box, and the **Remove** and **Remove All** buttons to remove the selected users/groups from the **Group Members** box.
5. When finished, click **Save** to apply changes.



User group membership

Deleting a User Group

As a Comindware administrator, you can delete any Comindware user group except default user groups (Administrators and Architects), and Active Directory groups. Deleting a user group does not delete the users contained in this group. A deleted user group cannot be restored.

To delete a user group:

1. Open the list of user groups.

2. Select the check box of the user group you want to delete.
3. Click the **Delete Group** button.

Adding Users And User Groups From Active Directory

You can import user profile information from the Microsoft Active Directory service if your company uses Active Directory in your domain. This saves time in entering user information for every user in your organization.

Connecting To Active Directory

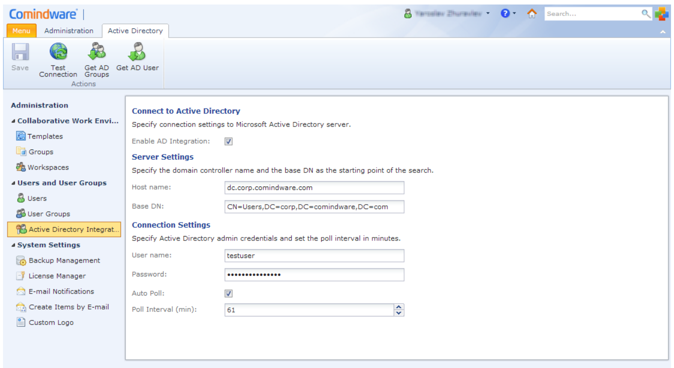
To import users and user groups from Active Directory, you should first connect to your Microsoft Active Directory service.

To connect to Active Directory:

1. Go to **Administration > Active Directory Integration**.
2. Select the **Enable AD Integration** check box.
3. Fill in the following server settings:

Name	Description
Host name	Provide the hostname or the IP address of your domain controller. *Example: corp.mycompany.com.*
Base DN	Set the starting point of a search in Active Directory. If no base DN is specified, the search starts at the root of the directory tree. *Example: CN=Users,DC=corp,DC=mycompany,DC=com*
User name	Enter a username to log in to the Active Directory server.
Password	Enter a password for the account used to log in to the Active Directory server.
Auto Poll	Select the check box to schedule automatic polling to run automatically at a specified interval.
Poll Interval	Specify your custom poll interval (in minutes), or leave the default value. By default the poll interval is 10 minutes.

4. Click **Save** to save changes.



Configuring Active Directory settings

Verifying Connection Settings

Click the **Test connection** button in the Ribbon to check your connection settings. If connection fails, check if all your settings are correct.

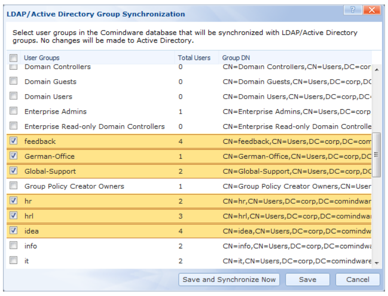
Importing User Groups From Active Directory

When you have configured Active Directory settings, you can get the list of user groups from the Active Directory server.

During import, user information is taken from the directory server and recorded into the Comindware database; no changes are made to the directory server. New user accounts that exist in Active Directory will be added into the Comindware database, however the information about existing users will not be updated.

To import users from Active Directory:

1. Go to **Administration > Active Directory Integration.**
2. Click the **Get AD Groups** button in the Ribbon.
3. Create a group mapping between Comindware user groups and Active Directory groups: select the check box beside the user group that you want to be added to the Comindware database.



Selecting user groups to import from Active Directory

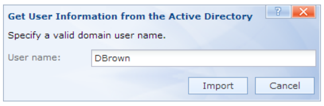
4. Click **Save and Get Groups Now** to update the Comindware user database with directory server user accounts.

Importing a Particular User From Active Directory

You may want to import a particular user account from the Active Directory server if the user is not a member of any group in Active Directory. During import, user information is taken from the directory server and recorded into the Comindware database. The imported user account won't be added to any Comindware user groups, you should add the user to the required groups manually.

To import a user account from Active Directory:

1. Go to **Administration > Active Directory Integration.**
2. Click the **Get AD User** button in the Ribbon.
3. Type a valid domain user name and click **Import.**



Importing a user from Active Directory

Adding An External User

An external user is a user who does not have access to your company domain, but who you allow to access your Comindware Tracker. For example, an external user may be a client or a remote employee.

The single sign on feature is not available for external users.

To add an external user:

1. Go to **Administration** > **Users**.
2. Click **New User** in the Ribbon.
3. In the **Login Name** and **Password** fields, provide user credentials, required for logging into Comindware Tracker.
4. Enter user details: full name, e-mail, IM addresses, mobile and business phone numbers, and other required information.
5. Select the **External User** check box.
6. Click **Save**.

Chapter 4

Creating Requestor Workspace

This chapter includes the following topics:

Prerequisites

Who can create and configure Requestor workspaces

Comindware architects or Comindware administrators

Preliminary steps

- Comindware Tracker Full license added, Comindware Tracker Requestor license added
- Users and user groups added
- Product keys for Comindware Tracker Full license and for Comindware Tracker Requestor license assigned to users
- Application created

About Requestor Workspaces

You can create a special workspace for Comindware users who do not have the Comindware Tracker Full license assigned, but who have to create tasks or documents in Comindware Tracker. Such users are called Requestors. In the Requestor workspace Requestors can create tasks in particular applications and manage tasks created by them. Requestors have their own type of license — Comindware Tracker Requestor license, which is much cheaper than the Comindware Tracker Full license.

Requestor workspace benefits

- no need to purchase extra Comindware Tracker Full licenses for Requestors. Requestors do not use the full functionality of Comindware Tracker.
- set up a custom view for items for Requestors.
- hide some information from Requestors, for example, budgeting spent on a particular task.

Use Cases

Implementing the Help Desk Service request processing process. Your company employees create a Help Desk ticket in the Requestors page and tracks its progress.

Implementing electronic document management process. Your company employees create document preparation requests to the Human Resources or Financial departments, for example, a Vacation Request or W2 Form Request.

Creating a Requestor Workspace

Requestor workspace creation process includes the following steps:

- Specify general settings, i.e. page URL, page name and description,
- Add Comindware Tracker applications, in which Requestors will create requests,
- Configure the field set on the Requestor workspace and field visibility settings.

To create a Requestor workspace:

1. Go to **Administration** > **Requestor Workspace.**
2. Click **New Page.**
3. Specify page general settings. In the left part of the window that opens, select **General** > **Page Information**, enter page details:

Value	Description
Page title	Enter a custom name for the page. Page title is shown at the top of the Requestor workspace. *Example: Help Desk Requests*
Description	Provide a description of the Requestor workspace. Workspace description is displayed at the top of the page under the page title. *Example: Submit your Request to the Technical Support Team in case of hardware, software installation issues, software reinstall/repair requests.*
Internal URL	Specify the Internal ID of the page. Internal ID will be added to your Comindware Tracker URL. *Example: supportrequests*
Full URL	In this field you will see how page URL will look like in the address bar of a browser. Full URL consists of the URL of your Comindware Tracker installation and the internal URL. *Example: http://www.companytracker.com/supportrequests*

4. Add applications in which requestors will create tasks or documents. In the left part of the window go to **General** > **Applications**, select applications. Use the **Add** and **Add all** buttons to add the selected apps, or **Remove** and **Remove All** buttons to remove the apps.
5. Specify visibility settings for each field. In the **Customize Settings** item select an application, choose a field name and specify its settings:

Value	Description
Read Only	Requestors will not be able to modify this field.

Invisible	The field will not be shown to Requestors.
Editable	Requestor can change the value of the field.

6. Set the field order in the web form. Select the field, click and hold left mouse button and drag the field upward or downward.
7. When finished, click **Save** or **Save & Close**.

Chapter 5

Configuring Outgoing E-mail Settings

This chapter includes the following topics:

Prerequisites

Who can configure outgoing e-mail settings

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups added
- Product keys for Comindware Tracker Full license assigned to users

Connecting To SMTP

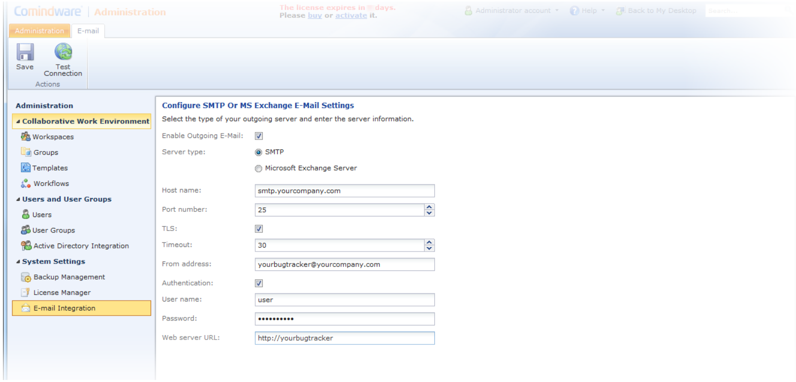
Connecting Comindware Tracker to a corporate e-mail server will allow sending e-mail notifications to Comindware users when particular events occur with tasks or documents, and sending scheduled e-mail reports to report recipients.

To connect Comindware Tracker to a company's SMTP server:

1. Go to **Administration > E-mail Notifications.**
2. Select the **Enable Outgoing E-mail** check box.
3. Choose **SMTP** as the e-mail server type.
4. Specify the following SMTP server details as specified in the table:

Value	Description
Host Name	Specify the full URL or IP address of your SMTP server *Example: smtp.yourcompany.com*
Port Number	Leave blank for default (port 25 for SMTP) or specify your value.
Timeout	Specify the timeout period in seconds. By default, the timeout is set to 10 seconds.
From address	E-mail address that appears in the "From" field of all e-mail messages sent by Comindware Tracker. *Example: tracker@yourcompany.com*
TLS	(optional) Select this check box if your server uses the Transport Layer Security encryption.
User name	(optional) Enter a user name if the e-mail server requires authentication.
Password	(optional) Enter a password if the e-mail server requires authentication.
Web Server URL	The URL of your Comindware web server which will be used as a link in body texts of e-mail notifications.

5. Click **Test Connection** to check the configuration and click **Save** to save the settings.



Configuring SMTP Server settings

Connecting To Microsoft Exchange Server

Comindware Tracker currently supports the following Microsoft Exchange Server versions:

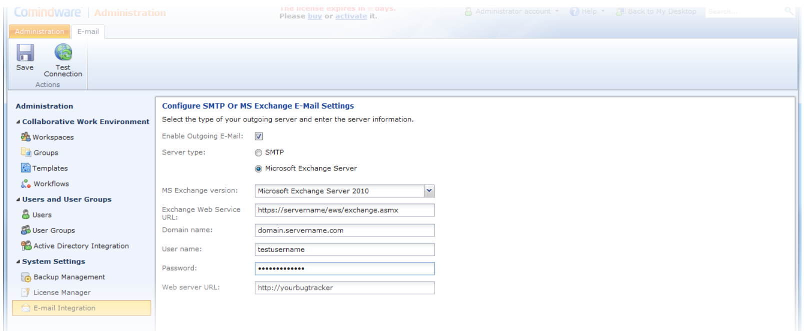
- MS Exchange 2007 SP1;
- MS Exchange 2010;
- MS Exchange 2010 SP1.

To connect to MS Exchange server:

1. Go to **Administration > E-mail Notifications.**
2. Select the **Enable Outgoing E-mail** check box.
3. Choose **Microsoft Exchange Server** as the e-mail server type.
4. Specify the following MS Exchange server details as specified in the table:

Value	Description
Server type	Choose **Microsoft Exchange Server.**
MS Exchange version	Choose the version of Microsoft Exchange Server that is currently used on your mail server.
Exchange Web Service URL	Enter the URL to Microsoft Exchange Web Service. *Example: https://servername/ews/exchange.asmx*
Domain name	Specify your domain name. *Example: corp.yourcompanydomain.com*
User name	Enter a user name.
Password	Enter a password.
Web Server URL	The URL of your Comindware web server which will be used as a link in body texts of e-mail notifications. *Example: http://yourcompanydomain.com:8081*

5. Click **Test Connection** to check the configuration and click **Save** to save the settings.



Configuring MS Exchange server settings

Chapter 6

Configuring Comindware Tracker To Create Items From E-mails

This chapter includes the following topics:

Prerequisites

Who can perform this operation

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups added
- Product keys for Comindware Tracker Full license assigned to users
- Workspace created, workspace participants added
- Applications created and configured

About Creating Tasks And Docs From E-mail Messages

Your tasks and documents can be automatically created directly from e-mail messages sent to a particular e-mail address associated with an application. As soon as you send an e-mail into such group, the e-mail becomes a task or document. The name will be the e-mail subject, and the body of the e-mail will become a task or doc description. E-mail attachments will be converted into a task or doc attachment.

This feature may be useful in a number of ways, for example:

- your staff can e-mail hardware or software problems to your company's Help Desk department, and the e-mails will be converted into Help Desk Requests,
- your staff can send document preparation requests to the Human Resources or Financial departments, and the e-mails will be converted into Document Requests.
- external customers can e-mail problems to the Technical Support Team, and the e-mails will be converted into Support Incidents.

Creating a New Account

To start creating tasks or items via e-mail, you should create and configure a new incoming e-mail account.

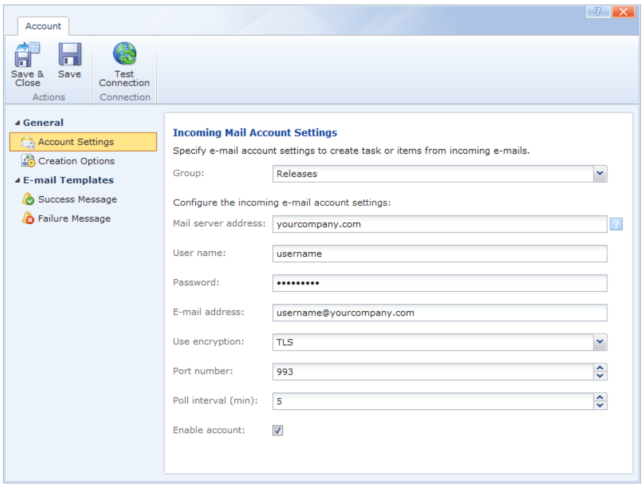
Configuring Account Settings

To create a new inbound e-mail account:

1. Go to **Administration > Create Items by E-mail.**
2. Click the **New Account** button in the Ribbon.
3. Fill in the account settings:

Name	Description
Application	Select an application the tasks or documents will belong to.
Mail server address	Type the address of the e-mail server, which hosts the pre-registered mailbox.
User name	Type a user name to access the mail server.
Password	Type a password to access the mail server.
E-mail address	Type the mail address of the pre-registered mailbox.
Use encryption	Enter the type of encryption, if required (available to select: None, TLS, SSL).
Port number	Set the port number or leave the default value.
Poll interval (min)	Set the mail server poll interval in minutes or leave the default value (10 minutes). The minimum polling interval is 5 minutes.
Enable account	Select the check box to activate the account.

Having specified all required parameters, click the **Test connection** button in the ribbon to try to establish connection with the mail server. Click the **Save** button in the ribbon to save the changes.



Configuring account settings

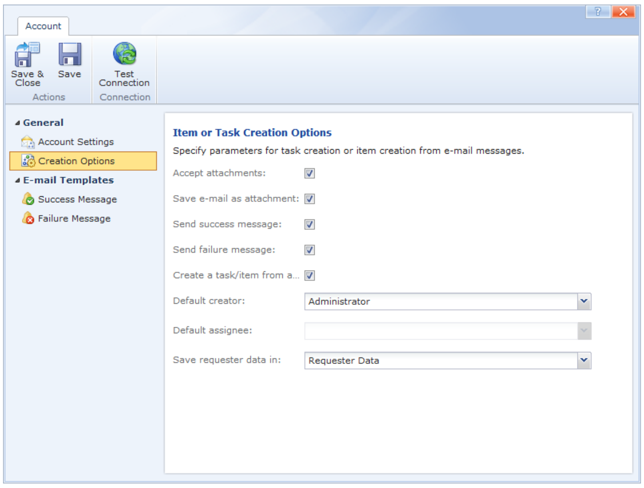
Specifying Item Creation Options

Specify task creation or document creation parameters from e-mail messages.

Name	Description
Accept attachments	Select the check box to add a message's attachments to a task or document.
Save e-mail as attachment	Select the check box if you want a message to be automatically saved as an attachment to the task/ document being created.
Create a task/ item from any e-mail	Choose whether to create tasks or documents from e-mails sent by any user, including both Comindware users and non-Comindware users. If the check box is not selected, only Comindware users granted Owners, Members, or Requestors permissions can create tasks or items in the selected group.
Send success message	Select the check box to send a notification upon successful creation of a task/doc.
Send failure message	Select the check box to send a notification if an error occurs while creating a task/doc.
Default creator	Select a Comindware user who will be set as creator of a task/doc by default. A default user will be set as task or document creator when an e-mail message is received from a non-Comindware user. If an e-mail message is sent by a Comindware user, the sender is set as creator of a task/document.

Name	Description
Default assignee	Select a default assignee of a task being created. A default assignee is not required documents and workflow tasks.
Save Requestor data in	Select the text field to copy the requestor's full name and e-mail address to. It is recommended that you create a text field for this purpose beforehand, during template creation.

To save the changes click the **Save** button in the ribbon.



Item creation options

Configuring Automatic Replies

Comindware Tracker can send automatic replies upon each received e-mail message. Automatic replies inform a requestor whether a task has been created or not.

Prior to activating automatic replies, you should configure global outgoing e-mail settings in **Administration** > **E-mail Integration.** See Configuring outgoing e-mail settings 36.

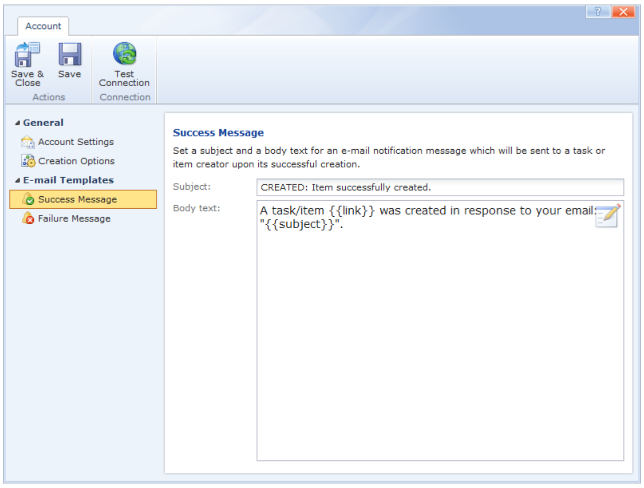
To activate automatic replies:

1. Go to **Administration** > **Create Items by E-mail.**
2. Select the e-mail account, and click the **Creation Options** tab.
3. Select the **Send success message** check box to send a notification when the task/ doc has been successfully created.
4. Select the **Send failure message** check box to send a notification if an error occurs while creating a task/doc.

To change the subject and body text of auto response messages:

1. Select the e-mail account, and click the **Success Message** tab, or **Failure Message** tab.
2. On the **Success Message** tab, specify the text of the e-mail message, which will be sent to the requestor upon task/doc successful creation. Type the subject and body of the message into the corresponding boxes.
3. On the **Failure message** tab, specify the text of the e-mail message, which will be sent to the requestor if an error occurs while creating a task/document. Type the subject and body of the message into the corresponding text boxes.

You can apply text formatting or pictures to the message. Click the icon in the **Body text** field to open the rich text editor window.



Success message template

Chapter 7

Adding a Custom Logo

This chapter includes the following topics:

Prerequisites

Who can add logos

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups added
- Product keys for Comindware Tracker Full license assigned to users

About Custom Logo

You can customize Comindware Tracker with your company's logo and favicon. Users will see your company logo and favicon every time they use Comindware Tracker. You can upload two different size pictures as a custom logo.

Wide Logo

The wide logo is displayed on the login page in the top right corner and in the Menu tab in the bottom left corner. The preferred size of the wide logo is 150x35 pixels.

Small Logo

The small logo is displayed in the program header to the right of the search box. The preferred size of the small logo is 24x24 pixels.

Favicon

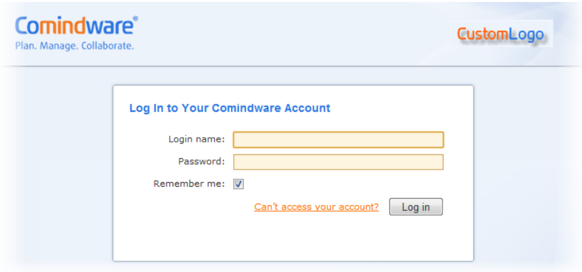
The favicon is a small 16x16-pixel picture displayed in the address bar of your browser.

You can also change the Comindware title, set a URL and a tooltip for the logo as well.

Adding a Wide/Small Logo

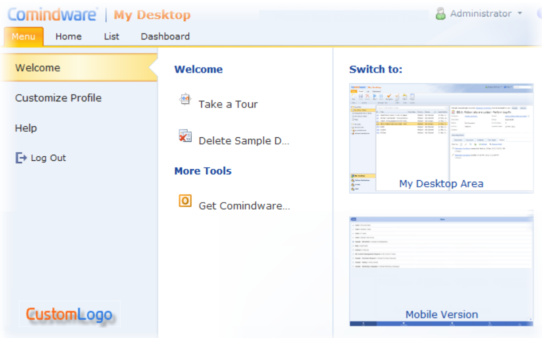
The wide logo is displayed:

- on the login page in the top right corner



Custom Logo is displayed on the login page

- in the Menu tab in the bottom left corner



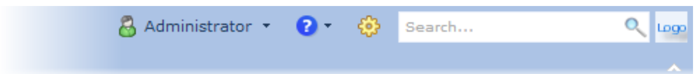
Custom Logo is displayed in main menu

To add a wide logo:

1. Go to **Administration** > **Custom Logo.**
2. Click the **Upload** button and select an image or logo for your organization. The preferred size of the wide logo is 150x35 pixels and the logo file must be in .gif, .jpg, .jpeg, or .png format.
3. Type the logo URL and hyperlink tooltip into the corresponding text boxes. When users click the logo they are taken to the page you designate in the **Logo URL** box. Text from the **Hyperlink Tooltip** box will be visible when the user hovers over your logo.
4. Make sure the **Enable** check box is selected.
5. Click the **Save** button in the Ribbon.

Adding a small logo

A small logo is displayed in the program header to the right of the search box.



Small Logo is displayed in the program header

To add a small logo:

1. Go to **Administration** > **Custom Logo.**

2. Click the **Upload** button and select an image or logo for your organization. The preferred size of the small logo is 24x24 pixels and the logo file must be in .gif, .jpg, .jpeg, or .png format.
3. Make sure the **Enable** check box is selected.
4. Click the **Save** button in the Ribbon.

Reset to default

To reset to default, click the **Reset** button or clear the appropriate text box, and click **Save** in the Ribbon.

Adding a Favicon

A favicon is a small 16x16 pixel picture which personalizes a site in the visitors' Favorites menu. A favicon typically appears to the left of your browser's address bar and on the browser tab next to the page's title.

To add a favicon:

1. Go to **Administration > Custom Logo**.
2. Click the **Upload** button and select a favicon file. The preferred size of the favicon is 16x16 pixels and the file must be in .ico format.
3. Make sure the **Enable** check box is selected.
4. Click the **Save** button in the Ribbon.

To reset to the default favicon, click the **Reset** button.

Adding a Title

The title of the page is displayed in the titlebar of the browser.

To add a page title:

1. Go to **Administration** > **Custom Logo.**
2. Type the text of the page title.
3. Make sure the **Enable** check box is selected.
4. Click the **Save** button in the Ribbon.

Chapter 8

Backing Up The Comindware Database

This chapter includes the following topics:

Prerequisites

Who can back up the Comindware database

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups created
- Product keys for Comindware Tracker Full license assigned to users
- Licenses assigned to users
- Workspace created, workspace participants added
- Applications created and configured

Setting a Backup Location

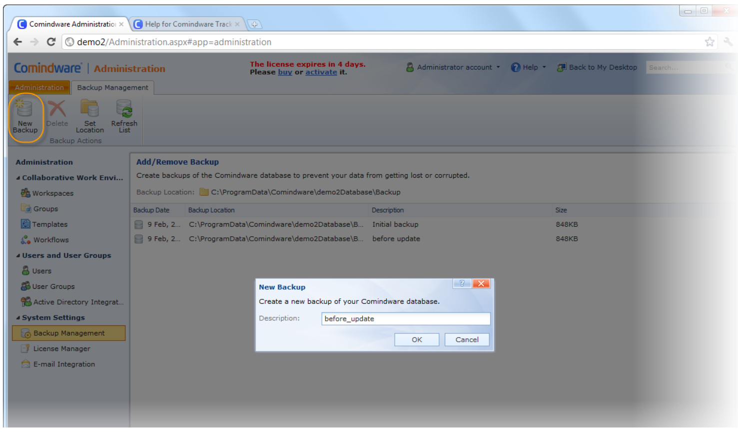
Backups are stored in a backup location. The default path is `C:\ProgramData\Comindware\Database\Backup\`. You can change the backup location to another local or network folder by clicking the **Set Location** button and specifying a new path. After you've changed a backup location, you will see only the backups stored in the selected backup location.

Creating a Backup

A backup is a copy of your Comindware database folder. The database folder includes your database files and attachments from tasks and items. Creating backups is necessary to prevent data loss in case of hardware crash or error, or to migrate database files to different hardware.

To create a backup:

1. Go to **Administration > Backup Management.**
2. Click **New Backup.**
3. Provide a description for the backup.
4. Click **OK** to start the backup process.



Specifying a description for the new backup

Restoring Data From a Backup

Restoring Comindware backups is performed from the **Comindware.DbRestore.exe** command-line utility located in the Comindware installation folder. The default path to the utility is C:/Program Files (x86)/Comindware/Products/Site/bin/.

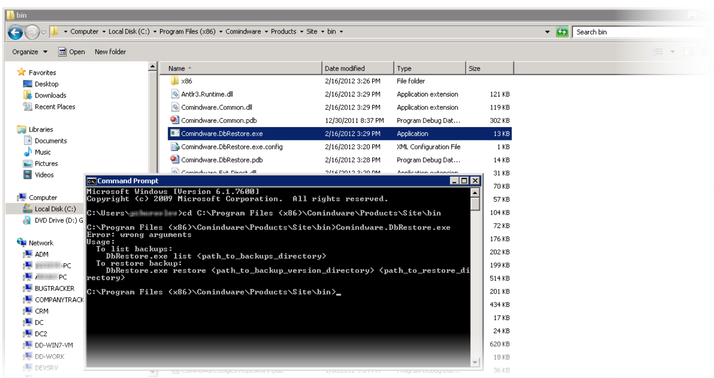
To restore a Comindware backup:

1. Stop the Comindware Products application pool if Comindware Tracker is installed as an IIS web site, or stop the Comindware Products service if Comindware Tracker is installed as a service.
2. Run the ComindwareDbRestore.exe command-line utility with administrator rights:
   - Click on the Windows Start button.
   - In the Start Search box, type in “Cmd” (without quotes).
   - Right click on the Command Prompt in the resulting search list.
   - In the right click menu, click on the “Run as Administrator” menu item.
   - Type-in the path to the Comindware.DbRestore.exe command-line utility (with double quotes):

   ```
   "C:/Program Files (x86)/Comindware/Products/Site/bin/Comindware.DbRestore.exe"
   ```
3. Go to the command-line utility and choose an action:
   - To list existing backups, type-in the following command (without the "< " and ">" symbols):

   ```
   "C:/Program Files (x86)/Comindware/Products/Site/bin/Comindware.DbRestore.exe" list <path_to_backup_location>
   ```
   - To restore a backup, type-in the command (without the "< " and ">" symbols):

   ```
   "C:/Program Files (x86)/Comindware/Products/Site/bin/Comindware.DbRestore.exe" restore <path_to_backup_location> <path_to_target_location>
   ```
4. Start the Comindware Products application pool or the Comindware Products service.



Restoring a backup

Default paths

The default path to a backup location is:

C:\ProgramData\Comindware\Database\Backup\. You can always find out the path to the backup location and the list of available backups in the **Administration > Backup Management** area.

The default path to the Comindware database is:

C:\ProgramData\Comindware\Database

Deleting a Backup

You may delete unnecessary backups if you no longer need them.

To delete a backup:

1. Go to **Administration > Backup Management.**
2. Select the backup from the list.
3. Click the **Delete** button in the Ribbon.

Alternatively, you can delete a backup manually from Windows Explorer or any other file manager.

Chapter 9

CSV Import

This chapter includes the following topics:

Prerequisites

Who can perform CSV Import

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups created
- Product keys for Comindware Tracker Full license assigned to users
- Workspace created, workspace participants added
- Application created and configured
- CSV file containing data from another database

About CSV Import

You can migrate existing data from other issue trackers or databases to Comindware Tracker. Data migration is accomplished through a CSV (comma-separated value) type file. Any Excel file can be stored as a CSV file. You can also update existing tasks or documents in a particular Comindware Tracker application with new data from a CSV file.

Benefits

Quick migration process of all data from previous issue tracking system

Seamless migration: nothing will be lost or forgotten

Bulk update of existing Comindware Tracker tasks and documents with new fields

How it works

You have created one or more CSV files that contain data from your previous issue tracking system.

You add the CSV file to Comindware Tracker and map CSV file fields to Comindware Tracker fields.

If you need to add a new field to existing tasks or documents in an app, you also map an existing Comindware Tracker field to a new field. A Comindware Tracker field should be created beforehand.

Examples

Migration from your previous issue tracking system to Comindware Tracker.

How To Migrate Data Using CSV

To add data from a CSV file:

1. Log in to Comindware Tracker using Comindware administrator credentials, go to **Administration** > **CSV Import.**
2. Add a CSV file to Comindware Tracker: click **Add CSV file...** select a file and click **Open.**
3. When the file is added, fill in the following settings:

Value	Description
Data source CSV file	Select the CSV file the data source is based on. *Example: BugList.csv*
Text separator	Select a separator character that is used in the CSV file. *Values: comma (,), semicolon (;), dot (.), tab, space.*
Code page	Choose a character set used in the CSV file from the list of predefined character sets. *Example: Cyrillic (Windows), Unicode, Central European (Mac).*
App to store migrated data	Comindware Tracker application where you want to migrate data or update existing data. *Example: IT Help Desk Requests*

4. Customize the field mapping between the CSV file and Comindware Tracker. Based on this mapping, new items will be added from CSV and created in Comindware Tracker.

   In the **Field Mapping** area, select a corresponding Comindware Tracker field from the drop down list which corresponds to a CSV field shown to the left.
5. Add a new field into existing Comindware Tracker items.

   In the **Unique Field** area, select the **Update existing items with a new field** check box, select the field from CSV and the corresponding field in Comindware Tracker. The Comindware Tracker field should be created beforehand.
6. When finished, click **Import CSV File.**

Chapter 10

Comindware Workflow For SharePoint

This chapter includes the following topics:

Prerequisites

Who can enable integration with Microsoft SharePoint Server

- Comindware administrators to configure the Comindware Tracker part
- Microsoft SharePoint site collection administrators to configure the Microsoft SharePoint part

Preliminary steps

- Comindware Tracker Full license added
- Users and user groups created
- Product keys for Comindware Tracker Full license assigned to users
- Workspace created, workspace participants added
- Application created and configured (fields, form, workflow)
- Microsoft SharePoint 2010 installed
- Microsoft SharePoint site created

What Is Comindware Workflow For SharePoint

Your company may already use Microsoft SharePoint for document exchange and collaboration. However, Workflow management functionality in SharePoint is rather complex and requires programming.

Comindware Tracker includes Comindware Workflow for SharePoint™, an easy-to-use graphical Workflow engine that allows creating and initiating workflows in SharePoint visually with no coding required.

Comindware Workflow for SharePoint integrates your existing SharePoint installation with Comindware Tracker, workflows ready solutions: Compliance and Policy, Software Development, Human Resources, IT Help Desk, or any your own solutions. You will be able to visually create or modify your processes in Microsoft SharePoint, and your team will create requests in the familiar SharePoint environment.

Benefits

- Build Workflows and business applications in SharePoint with a graphical Comindware workflow builder that requires no coding.
- Initiate requests and processes in SharePoint and track their status in real-time.
- Comindware Tracker® is easier and cheaper to deploy and use. It does not install anything inside SharePoint and, thus, does not involve extra associated IT costs and associated IT costs and extra security and integrity issues.
- Comindware Workflow for SharePoint works with the native SharePoint user interface, so users don’t get confused and don't have to learn anything.

How it works

You use a pre-designed solution in Comindware Tracker or have your own configured solution in Comindware Tracker.

You use Microsoft SharePoint as a resource for document storage and collaboration.

You create a new site in Microsoft SharePoint.

You configure integration settings in Comindware Tracker, such as tasks that your team members will create in SharePoint, a SharePoint web site where these tasks will be created.

You re-login to Microsoft SharePoint and your integration is ready. Open the SharePoint site and create a request.

When the request is created, it will be processed through the workflow in Comindware Tracker. When the request is completed, you will see the result in SharePoint.

Integration examples

Your team members initiate different types of requests from Microsoft SharePoint, for example, create a Help Desk request, or a Purchase request.

How To Configure Integration with SharePoint Server

Integration of Comindware Tracker and Microsoft SharePoint is configured on both sides: Comindware Tracker and Microsoft SharePoint. First, you configure the integration settings in Comindware Tracker, then configure the site settings and security settings in Microsoft SharePoint.

Configuring Integration Settings In Comindware Tracker

To create a new integration with the Microsoft SharePoint Server in Comindware Tracker:

1. Log in to Comindware Tracker using Comindware administrator credentials, go to **Administration** > **Comindware Workflow For SharePoint.**
2. Click **New Integration.**
3. Specify general settings for the page. In the left part of the window that opens, select **General** > **Integration Settings**, enter page details:

Value	Description
Name	Enter a custom name for the integration. Integration name is displayed only in Comindware Tracker. *Example: IT Help Desk Requests*
Description	Provide a description of the SharePoint integration workspace just to remember what the integration does. *Example: Creation of Help Desk Tickets and requests in case of any hardware or software problems.*
SharePoint URL	The URL to your Microsoft SharePoint site. *Example: http://yoursharepointsite.com:8081*
Comindware Tracker URL	The URL to your Comindware Tracker installation. *Example: http://yourcomputer:8081, where 'yourcomputer' is a computer name or IP address, 8081 is a port number.*
Authentication	Choose the authentication mode used by your SharePoint server. *Values: NTLM, Kerberos, LDAP.*
LDAP membership provider name (if LDAP authentication	Enter the name of the membership provider. The membership provider must be correctly configured in the web.config file for the IIS Web site that hosts SharePoint content on each Web server. It must also be added to the web.config file for the IIS site that

Value	Description
selected)	hosts SharePoint Central Administration.
Domain	Enter your corporate domain name.
Login name	Enter a user name for your domain user account.
Password	Enter a password for your domain user account.
Status	The status of your integration with the Microsoft SharePoint Server. *Values: Not Started, In Progress, Up-to-Date, Failed.*

4. Add applications in which SharePoint users will create tasks or documents. In the left part of the window go to **General** > **Apps**, select applications. Use the **Add** and **Add all** buttons to add the selected apps, or **Remove** and **Remove All** buttons to remove the apps.
5. Specify visibility settings for each field. Go to **Customize View**, select an application, choose a field name and specify its settings:

Value	Description
Read Only	SharePoint users will not be able to modify this field.
Invisible	The field will not be shown in SharePoint.
Editable	SharePoint users can change the value of the field.

6. Set the field order in the web form. Select the field, click-and-hold left mouse button and drag the field upward upward or downward.
7. When finished, click **Save** or **Save & Close**.

Configuring Integration Settings In Microsoft SharePoint

After you have configured the Comindware Tracker part, you should configure the Microsoft SharePoint part. You must have the SharePoint site collection administrator permissions.

To enable integration in Microsoft SharePoint:

1. Open SharePoint administration (click **Start** > **Administrative Tools**, and then click **SharePoint Central Administration).**
2. Click **Manage Web Applications** and click **New** to start creation of a new SharePoint application. Fill in the application details, click **OK.** The SharePoint application will be created. You can also use an existing SharePoint application.
3. Add users who will create Comindware Tracker tasks in SharePoint and assign owners permissions to them. Open site settings, click **Site permissions**, click **Grant**

Permissions. Add users, grant them **Owners** permissions**.**

Chapter 11

Enabling Single Sign-On

This chapter includes the following topics:

Prerequisites

Who can enable Single Sign-On

Comindware administrators

Preliminary steps

- Comindware Tracker Full license added

About Single Sign-On

The single sign-on feature allows a user to log in once in Comindware Tracker without being prompted to log in again next time when a user wants to access Comindware Tracker.

Single sign-on benefits:

- Reducing password fatigue from different user name and password combinations
- Reducing time spent re-entering passwords for the same identity
- Reducing IT costs due to the lower number of IT help desk calls about passwords

To enable the single sign-on feature, a Comindware administrator should modify the web.config file in the Comindware Tracker installation folder. As soon as the file is configured, each Comindware Tracker user who would like to use this feature must configure their web browser by adding the Comindware Tracker URL to the list of trusted web sites.

External users cannot use the single sign-on feature.

Enabling Single Sign-On In Comindware Tracker Installation

To configure the single sign-on feature, you will need to change the settings in the **web.config** file located in the product installation folder. Please note, that after each update of Comindware Tracker the web.config file will be overwritten with the new one. You will need to back up the configured web.config file before update and restore it when the update is finished.

To enable single sign-on:

1. Open the Web.config file in a text editor such as Notepad. By default the Web. config file is located in:

   C:\Program Files (x86)\Comindware\Products\Site\Web.config

2. Find the following line in the file:

```
<authentication mode="None"/>
```

3. Change the authentication mode from **None** to **Windows**:

```
    <!-- To enable SSO set Windows mode instead of None -->
    <authentication mode="Windows"/>
```

4. Find the following line:

```
    <!-- Uncomment to enable SSO -->
    <!--security>
          <authentication>
              <anonymousAuthentication enabled="false" />
              <windowsAuthentication enabled="true" />
          </authentication>
      </security-->
```

5. Uncomment the *<security></security>* block:

```
    <!-- Uncomment to enable SSO -->
    <security>
          <authentication>
              <anonymousAuthentication enabled="false" />
              <windowsAuthentication enabled="true" />
          </authentication>
      </security>
```

6. Save the **Web.config** file.

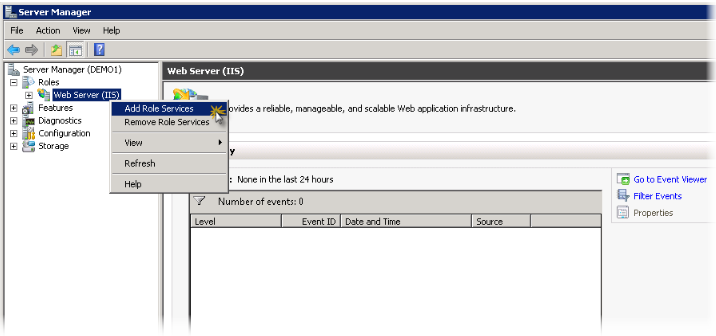
Configuring Single Sign-On Under IIS

If your Comindware Tracker is installed as an IIS server, you will need to configure Windows Authentication in IIS. The default authentication configuration for IIS 7 enables Anonymous authentication only.

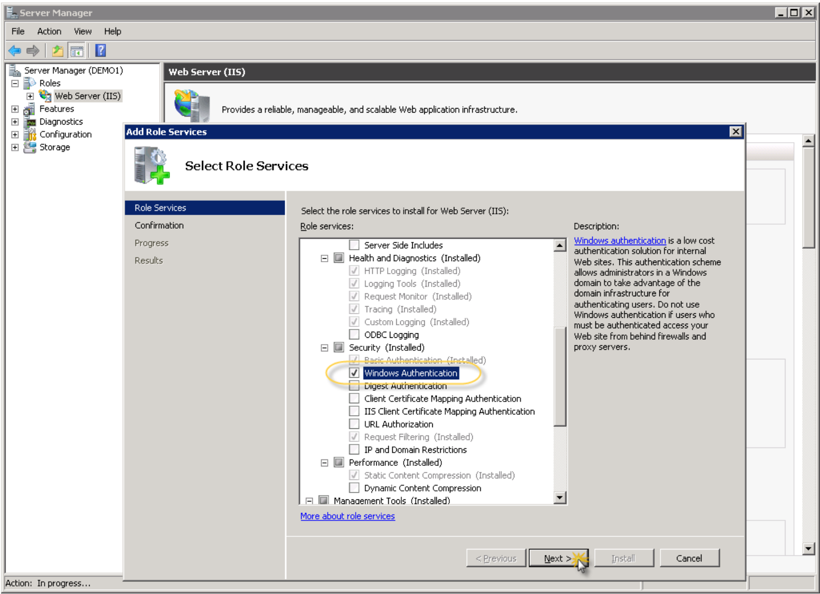
Before configuring, make sure you have modified the web.config file as described in Configuring Comindware Tracker files 76.

Installing the Windows Authentication Module

1. Go to **Start** -> **Administrative Tools** -> **Server Manager.**
2. Click **Roles** to expand it.
3. Click **Web Server (IIS)**, then right-click and select **Add Role Services.**



4. Select the **Windows Authentication** check box and click **Next.** If the box is already checked then that means the module is already installed.

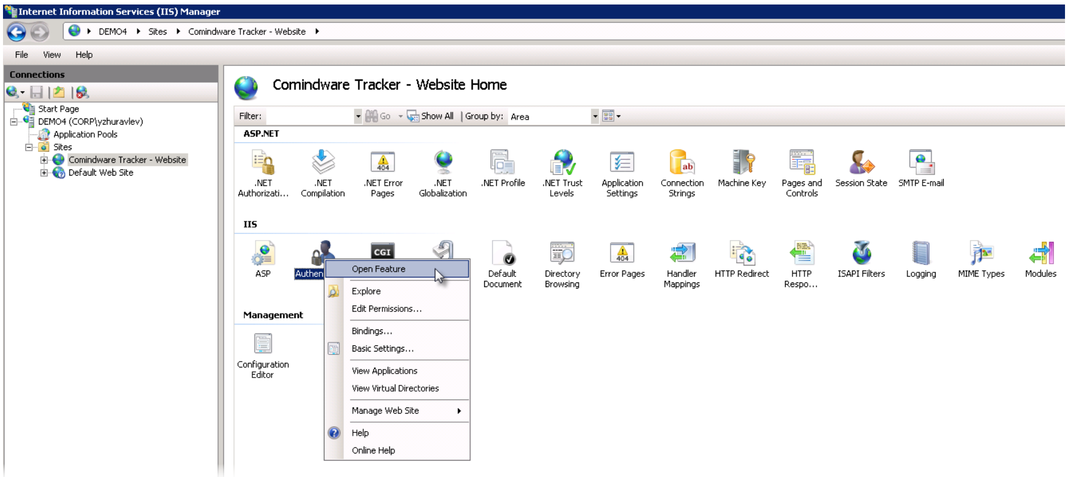


5. Click the **Install** button.

Enabling Windows Authentication

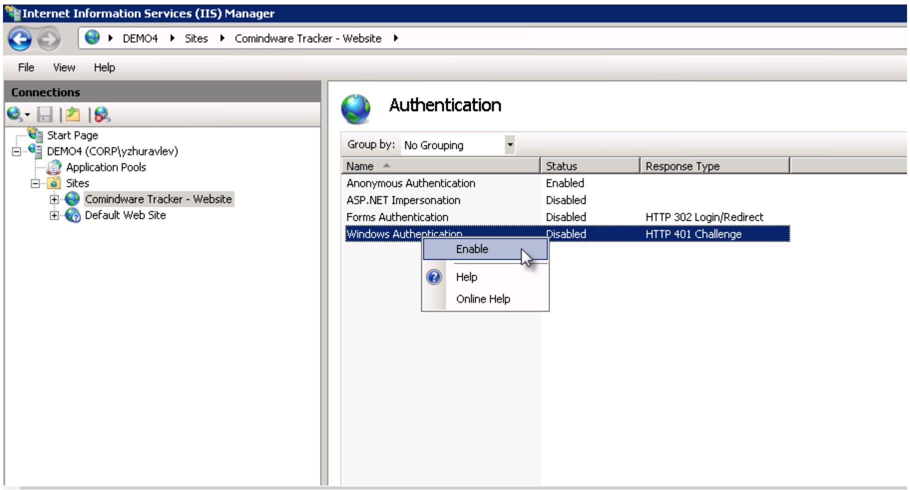
1. Open IIS Manager: click **Start**, in the **Start Search** box, type **inetmgr** and press **ENTER.**
2. Navigate to the **Comindware Web-site** item in the left pane.

3. In **Features** View, double-click **Authentication**, or right-click on **Authentication** and select **Open Feature**.



4. On the **Authentication** page, select **Windows Authentication.**

5. In the **Actions** pane, click **Enable** to use Windows authentication.



Configuring Your Web Browser

After the Comindware administrator has enabled single sign-on on the server, each Comindware user who would like to use this feature should configure their web browser. Single sign-on can be configured for the following browsers:

- Internet Explorer
- Mozilla Firefox
- Google Chrome

Configuring Mozilla Firefox

Each Comindware user who would like to use single sign-on should add the Comindware Tracker URL to the list of trusted URIs in the **network.automatic-ntlm-auth.trusted-uris** parameter in Mozilla Firefox.

To enable single sign-on in Mozilla Firefox:

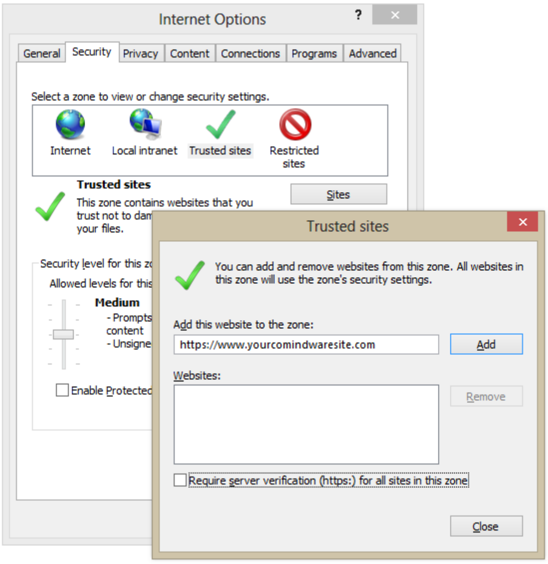
1. Open Mozilla Firefox.
2. In the address bar of the web browser type the following text: **about:config.** Mozilla Firefox 3.x and later will ask for your permission to proceed.
3. In the **Search** box type the following text: **network.automatic**
4. Modify the **network.automatic-ntlm-auth.trusted-uris** parameter by double clicking on it and entering the URI address of your Comindware Tracker. A comma and space delimited list of URLs is allowed, for example, http://<MachineNameWhereComindwareIsInstalled>, http://<OtherMachineNameWhereComindwareIsInstalled>
5. Restart Mozilla Firefox.

Configuring Internet Explorer

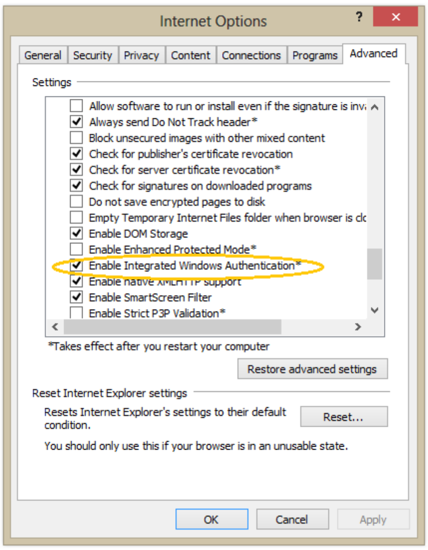
Each Comindware user who would like to use single sign-on in Internet Explorer should add the Comindware Tracker web site to the list of the trusted web sites.

To enable single sign-on in Internet Explorer:

1. In Microsoft Internet Explorer, go to **Tools** > **Internet Options.**
2. Click the **Security** tab and choose the **Trusted Sites** icon.
3. Click on the **Sites** button. A window will open, where you can add the sites that you wish to be in the **Trusted** zone. Be sure to remove the check by the **Require server verification (https:)** entry.



4. Enter the Comindware Tracker site address in the line provided. Site URLs can be typed in directly or copied and pasted.
5. Click **Add**, the site will be added to the trusted sites list.
6. Click **OK.**
7. Click the **Advanced** tab.
8. Select **Enable Integrated Windows Authentication** check box.



9. Click **OK.**