Visual Intercept Manager Help Contents

The following Visual Intercept Manager Help Topics are available:

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What is the Visual Intercept Manager?

How to use the Visual Intercept Manager

Reference Information

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For Help on Help, Press F1.

What is the Visual Intercept Manager?

Visual Intercept Manager - The Visual Intercept Manager is the heart of the Visual Intercept Incident Management System. The Visual Intercept Manager is the tool which allows you to work with Incident, Project, Account, and Contact documents.
Visual Intercept Browser - An important component of the Visual Intercept Manager is the Browser. The Visual Intercept Browser provides you with a visual representation of your project hierarchy (*i.e.,* a project tree) and related Incidents, Accounts, Contacts, 3rd party documents and source code.
The Visual Intercept Manager and Browser help you easily navigate through Visual Intercept's powerful Incident Management System!
In addition to the Manager, Visual Intercept is made up of the following programs:
- **Visual Intercept Installer** - Installs the Visual Intercept Incident Management System.
- **Visual Intercept Wizard** - Helps create your software development project hierarchy.
- **Visual Intercept Administrator** - Performs necessary housekeeping functions such as adding Visual Intercept users and privileges and configuring the Visual Intercept Manager.
- **Visual Intercept Notification Server** - Notifies Visual Intercept users of document and configuration changes.

Reference Information

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Welcome to Visual Intercept

Thank you for choosing the Visual Intercept Incident Management System.

Visual Intercept is an easy, effective, and efficient tool for team development of software. The Visual Intercept Incident Management System is designed to help you manage your software development projects from inception through initial release and subsequent maintenance.

As the software development process proceeds, new ideas are generated, features are requested, modified, and deleted, documentation issues arise, beta testers are engaged to evaluate the product, and bugs are discovered. An important activity of software development and maintenance is discovering, monitoring, and resolving incidents that affect the quality of the software. Delegating incidents to appropriate members of a project team is critical to effective and efficient incident management. The Visual Intercept Incident Management System is designed to help make this process more effective and efficient.

Visual Intercept automates the difficult and time consuming task of manually tracking an incident's progress from discovery to resolution.

Here are just some of the features of the Visual Intercept Incident Management System:

- **Project oriented** - Incidents are directly related to specific software development projects.

- **Browser** - Provides a visual representation of your project hierarchy and related incidents, accounts, and contacts.

- **Enterprise ready** - Integrates with Microsoft Visual SourceSafe, Microsoft Visual Basic, Microsoft Visual Test, and is fully scaleable.

- **Notification** - Notifies Visual Intercept users of document changes and integrates with all MAPI (*i.e.,* MS Mail) and VIM (*i.e.,* cc: Mail) network mail systems.

- **Multiple data sources** - Works with multiple database management systems via ODBC.

- **Wizard** - Helps you create project hierarchies or import existing project structures from Visual SourceSafe.

Technical Support

When you have a question

If you have a question about Visual Intercept, first look in the product documentation or consult online Help. You can also find late-breaking updates and technical information in the README file that came with your Visual Intercept disks. If you cannot find the answer, you can telephone the Elsinore support engineers.

Calling Elsinore Support Engineers

No-charge support from Elsinore support engineers is available via a toll call between 8:00 A.M. and 4:00 P.M. Central time, Monday through Friday, excluding holidays. This support is available for all registered owners of Visual Intercept products.

- For technical support for Visual Intercept, call (713) 956-1221.

When you call, you should be at your computer and have the appropriate product documentation at hand. Be prepared to give the following information:

- The version number and product ID of the Visual Intercept product that you are using.
- The type of hardware that you are using, including network hardware, if applicable.
- The operating system that you are using.
- The exact wording of any messages that appeared on your screen.
- A description of what happened and what you were doing when the problem occurred.
- A description of how you tried to solve the problem.

Contacting Elsinore Support Engineers

Phone: (713) 956-1221

Fax: (713) 956-0889

Internet: elsinore@neosoft.com

CompuServe: 72122,3545

to the following:
Mark Uland
Susan Uland
Albert Lin
Jay Hendrickson

Child Project

A project which is below another project in the project structure.

Why do you need to define a data source?

You need to define a data source so that the Visual Intercept application programs know specifically which database to use and its physical location. You can define multiple data sources to use with Visual Intercept. When you launch Visual Intercept, you will be asked which data source you would like to use.

Data Source Objectives

The following diagram depicts an example of the state of your system after defining, naming, and selecting a SQL Server data source.

Note the links between the SQL Server database and Visual Intercept. The physical location of the database management system and the Visual Intercept database is the data source. After you define a data source, Visual Intercept is ready to use.

Data Source

A data source specifies the exact name of a database and its physical location. By defining a data source, you do not have to remember the exact path and database name when you want to access a specific database.

Data Source Objectives

Complete definition of a data source will meet the following objectives:

1. Provide the specific address of the Visual Intercept database.

    - Identify the physical location of the Visual Intercept database.

    - Identify the specific name of the database. See your System Administrator for the specific Visual Intercept database name.

2. Naming the data source. Once a data source is named, you do not have to reenter the complete address each time you want to use Visual Intercept. You can name a data source any name you prefer.

Incidents

Incidents are relevant events, episodes, occurrences, or "bugs" that emerge during the course of project development. Some examples of common incidents are:

- A request for features or enhancements.
- Technical documentation errors.
- Software bugs or any other unexpected behavior of the application (*i.e.*, the system crashes).
- Hardware, factory, or production problems.
- Third party incompatibility problems.

General description of ODBC drivers

Open Database Connectivity (ODBC) drivers are the links between the ODBC specified application program interface (API) and a specific database management system. Visual Intercept communicates directly with the ODBC API. Therefore, with the appropriate ODBC drivers, you can use Visual Intercept with any database management system.

API

Application Programming Interface.

DBMS

Database Management System (*e.g.,* SQL Server, Oracle, MS Access, etc.)

What is ODBC?

The Visual Intercept Incident Management System is not database specific. However, in order for an application such as Visual Intercept to "talk" to a specific database, a link must be established to translate commands between the Visual Intercept application programs and the database. This link is called an application program interface (API).

Open database connectivity (ODBC) is an application program interface specification developed by Microsoft® which allows a single application to access many different database management systems (DBMS). Without a specified interface, software developers would have to create database-specific applications and users would have to purchase separate database management systems for each database-specific application they used.

A specified API, such as ODBC, allows software developers to create applications that are independent of the type of DBMS that might be used. Users can then add ODBC drivers which link an application, like Visual Intercept, to the database of their choice.

The good news is that by adding the appropriate database drivers, you can link Visual Intercept to any database management system. However, you do need to be familiar with the installation components and procedures to install the appropriate database ODBC drivers and identify the location and database of your database management system.

Open Database Connectivity (ODBC) drivers are the links between the ODBC specified application program interface (API) and a specific database management system. Visual Intercept communicates directly with the ODBC API. Therefore, with the appropriate ODBC drivers, you can use Visual Intercept with any database management system.

Parent Project

A project which is above another project in the project structure.

Project Hierarchy

A defined relationship among projects where the projects are ranked one above the other in a series. The Visual Intercept System typically refers to projects as child or parent.

SRCSAFE.INI

The Visual SourceSafe INI file which contains the location of the data directory.

Contact

A contact is a person who can provide significant information regarding an incident or account. Although contacts may be Visual Intercept users, they can also be beta testers, customers, industry resources, etc..

Account

A Visual Intercept account is used to identify a project's financial accountability. Financial accountability and responsibility for a project's success is an important factor in project development and incident tracking. As the number and size of projects increase within an enterprise, project responsibility becomes increasingly complex.

Fetch

Fetching retrieves Visual Intercept documents directly from a data source.

Insert

Inserting a Visual Intercept document saves the document to a common data source. Once a Visual Intercept document is inserted into a common data source, it can be shared by other Visual Intercept users.

Update

Updating a Visual Intercept document saves a modified document to a common data source. When you update a previously inserted Visual Intercept document, the changes will be available to other Visual Intercept users.

Refresh

Refreshing a Visual Intercept document re-fetches the document you are working in and effectively allows you to start over with the Visual Intercept document. Should you fetch a document, make modifications to it, and then decide **NOT** to update the changes into a common data source, you can simply refresh the document.

Save

Saving a Visual Intercept document saves the document to a local file. It is NOT placed in a common data source and can not be shared by other Visual Intercept users. Saving Visual Intercept documents is helpful when you are working with a document but not yet ready to share the information with other Visual Intercept users. You can simply save the document and insert or update it later.

Open

Opening a previously saved Visual Intercept document allows you to continue working on the document. When you have finished, you can either save the document to a local file or insert or update the document to a common data source. Inserting or updating the Visual Intercept document will make it available to other Visual Intercept users.

Send

When you send a Visual Intercept document, you use your network mail system to transmit the document to network users.

Import

You can import data from other Visual Intercept data sources or from other databases. Importing allows you to insert data into the Visual Intercept database as specific Visual Intercept documents.

Export

Exporting Visual Intercept data places the data into a file. You can export all or part of a Visual Intercept document.

Define

Defining a Visual Intercept document is the process of entering data into the document. Typically, information is entered into a Visual Intercept document via unique views to the document.

Attach

Attaching a document to a Visual Intercept document relates the two documents.

- You can attach 3rd party documents, source code, contacts, and other incidents to an Incident Document.

- You can attach one or more contacts to an Account Document.

- You can attach one account to a Project Document.

- You can attach one or more projects to a Project Document.

Detach

Detaching a document from a Visual Intercept document un-relates the two documents.

Query

You can fetch or retrieve Visual Intercept documents from a common data source based on custom queries.

Views

Visual Intercept allows you to examine information contained in a Visual Intercept document from unique *Views*. Each unique *View* in a Visual Intercept document can be displayed via the View Tabs located just above the Header.

Although each *View* shows unique information, it is important to remember that the Visual Intercept document contains all the information displayed in each of the unique *Views*. The views are merely a way to display information in an organized fashion.

Visual Intercept Administrator

This program allows you to perform administration functions such as setting up users, passwords, privileges, etc.

Manager

This is the heart of the Visual Intercept Incident Management System. The Manager is where you work with incidents, projects, accounts, and contacts.

Visual Intercept Notification Server

This program notifies Visual Intercept users of Visual Intercept document and configuration changes.

Visual Intercept Wizard

This program will help you set up your [Project Hierarchy](#) .

Visual Intercept Sheriff

The Sheriff is a Visual Basic Add-In which allows beta testers and other end users to easily register incidents into the Visual Intercept Incident Management System.

Once incorporated into a Visual Basic application, an incident can be registered by bringing up the Sheriff Incident Form from within an application.

Readme.txt and Install.wrt

These files provide you with late breaking information regarding Visual Intercept.

Server

A server is a network computer that manages common resources in a network environment. For example, a network server manages network functions, a print server manages printing functions, a database server manages common database management systems, etc.

Clipboard

A temporary storage area in memory, used to transfer information. You can cut or copy information onto the Clipboard and then paste it into another document or application.

Insertion point

A vertical blinking bar on the Visual Intercept screen that shows your location in a document and where the next text will be inserted.

Landscape

A term used to refer to horizontal page orientation; opposite of portrait, or vertical orientation.

Portrait

A term used to refer to vertical page orientation; opposite of landscape, or horizontal, orientation.

Application Control menu

A menu that has commands for sizing and moving the Visual Intercept window, switching to other applications, and closing Visual Intercept.

To display the menu using the keyboard, press ALT+SPACEBAR.

Toolbar

A bar with buttons that perform some of the most common tasks in Visual Intercept, such as inserting, updating, and deleting documents.

To display or hide the Toolbar, toggle Toolbars from the Window menu.

Active Window

The window in which you are working. The active window contains the insertion point or a selection of text. The title bar in the active window is highlighted.

Window Caption Bar

This is the caption of the [active window](#) .

Open File Dialog Box

This dialog box is used to open a file.

To open a file, do the following:

1. Select the drive where the file located.

   Note: You can also search the Network for the appropriate drive.

2. Select the directory where the file is located.

3. Select the name of the file.

   Note: You can display all or selected files via the List of Files Type.

4. Click OK.

New Document Dialog Box

This dialog box is used to create a new Visual Intercept document.

Select a document from the list and then click OK.

Save File Dialog Box

This dialog box is used to save a document to a file.

To save a file, do the following:

1. Select the drive where you want to save the file.

   Note: You can also search the Network for an appropriate drive.

2. Select a directory.

3. Enter the name of the file or choose an existing file name from the list.

   Note: You can display all or selected files via the Save File as Type.

4. Click OK.

Print Setup Dialog Box

Provides a list of installed printers and provides access to other printing options for the printer you select.

Before you can print in Visual Intercept for the first time, you must:

- Connect the printer to your computer or a network by using the instructions in your printer manual.

- Install a printer driver.

- Select the printer you will use in the Print Setup dialog box.

Dialog Box Options

Printer name
Select the printer you want to use.

Properties
Controls printer settings for the printer you select in the Printers list. The available options vary depending on the printer driver.

Paper Size
Select the paper size on which you want to print.

Paper Source
Select the paper source on which you want to print.

Orientation
Select the page orientation: portrait (vertical) or landscape (horizontal).

Bullet List
Select this option for a bullet listing of the documents selecting for printing.

Verbose
Select this option for a detailed listing of the documents selecting for printing.

Bottom of Active Window

This is the bottom of the active [active window](#) .

SCCS

Source code control system.

Database Schema

A database schema is the structure of how information is maintained within a database. For example, an address database might contain name, address, and phone number fields. The schema would define the name and number of characters per field, the order of the fields, and the type of field (*i.e.*, text or numerical).

New Command

This command allows you to create a new Visual Intercept document.

1. Do one of the following:

   - From the Menu bar, click <u>F</u>ile, and then click <u>N</u>ew.

   - Press CTRL+N.

   - Click one of the New Visual Intercept document shortcut buttons on the Main toolbar.

2. From the New dialog box, select a Visual Intercept document type, and then click OK.

Open Command

This command allows you to open an existing Visual Intercept file. Visual Intercept keeps track of the most recently opened files. You can quickly open a file by selecting the file from the Recent File section at the bottom of the File menu.

To open a Visual Intercept file

1. Do one of the following:

    - From the Menu bar, click File, and then click Open.

    - Press CTRL+O.

    - Click the Open shortcut button ☝ on the Main toolbar.

2. From the Open dialog box, select the drive and directory where the Visual Intercept file is located.

3. Select the Visual Intercept file to open.

4. When you have selected the Visual Intercept file to open, click OK.

Dialog Box Options:

Look in
Choose the folder location of your Visual Intercept documents.

File name
Select, or type, the name of the document you want to open. This box lists documents with the filename extension selected in the Files of type box. To see a list of files with a particular extension, type an asterisk (*), a period, and the three-character extension, and then press ENTER. To see files with more than one filename extension, type a semicolon (;), a second asterisk (*), a period, and another three-character extension.   For example, if you want to see all files with the .ISC extension and all files with the .ISA extension, type ***.isc;*.isa**

Files of type
Select the type of file you want to see in the File name list.

All Files (*.*)
Lists all files in the current directory.

Close Command

This command closes the active Visual Intercept document. If the document is displayed in more than one window, all windows that contain the active document will be closed. If you have not previously saved changes to the document, Visual Intercept asks if you want to save the document before you close it. If you close a document without saving, you lose all changes you did not save previously.

Save Command

This command allows you to save a Visual Intercept document to a local file. This is important if you are working on the document but are not yet ready to insert the document and share it with other Visual Intercept users.

Note: If you want to change the name (or location) of a Visual Intercept file, choose the Save As command.

You must be working in a Visual Intercept document in order to save the document.

1. Do one of the following:

    - From the Menu bar, click File, and then click Save or Save As.

    - Press CTRL+S.

    - Click the Save shortcut button 💾 on the Main toolbar.

2. From the Save As dialog box, select the drive and directory where you want to save the Visual Intercept file.

3. Enter the name of the Visual Intercept file and then click OK.

Dialog Box Options

Look in
Choose the folder location of your Visual Intercept documents.

File name
To save a document with a new name or in a different location, type a new filename.

To save a document with an existing filename, select the name in the list or type the current name. When you choose the OK button, Visual Intercept asks if you want to overwrite the existing document.

Save As Type
Visual Intercept can save documents in different file formats. Visual Intercept recognizes if you are trying to save a specific Visual Intercept document type and automatically suggests a file name with an appropriate extension.

Save As Command

This command is similar to the **Save Command** . If you want to change the name (or location) of a Visual Intercept file, choose the Save As command.

Save All Command

This command will save all open Visual Intercept files. See the [Save Command](#) for details.

Send Command

This command allows you to utilize your network mail system to send Visual Intercept documents. This is especially helpful if you want to send Visual Intercept information to non-Visual Intercept users on the network.

1. Select a Visual Intercept document.

2. Click File on the Menu bar.

3. Click Send.

4. Follow your network mail prompts to send the Visual Intercept document.

Print Command

Controls how a document is printed. Before using this command, you must install and select a printer. To select a printer, see the [Print Setup Command](#) .

To print one Visual Intercept document.

1. Select a Visual Intercept document from the project tree or from a list.

2. Do one of the following:

    -   From the Menu bar, click <u>F</u>ile, click <u>P</u>rint (or Print Pre<u>v</u>iew to preview the print job).

    -   Press CTRL+P.

    -   Click the Print shortcut button ⬛ on the Main toolbar.

To print several Visual Intercept documents.

1. From a query list, select the Visual Intercept documents you wish to print.

2. Do one of the following

    -   From the Menu bar, click <u>F</u>ile, click <u>P</u>rint or Print Pre<u>v</u>iew

    -   Press CTRL+P.

    -   Click the Print shortcut button ⬛ on the Main toolbar.

3. Select the appropriate options (see below) in the Print Options dialog box.

Dialog Box Options

All documents
Select this option to print all documents in the active window.

Selected documents
Select this option to print all documents that are currently selected in the active window.

Query documents
Select this option to print all documents that are retrieved with the query you choose from the Query drop down list or Build.

Query
You can select an existing query from the drop down list.

Build
You can choose to create a new query with the Query Builder.

Bullet List
Select this option for a bullet listing of the documents selecting for printing.

Verbose
Select this option for a detailed listing of the documents selecting for printing.

Print Preview

This command is similar to the <u>Print Command</u> and allows you to preview a print job.

Print Setup Command

Provides a list of installed printers and provides access to other printing options for the printer you select.

Before you can print in Visual Intercept for the first time, you must:

- Connect the printer to your computer or a network by using the instructions in your printer manual.

- Install a printer driver.

- Select the printer you will use in the Print Setup dialog box.

Dialog Box Options

Printer name
Select the printer you want to use.

Properties
Controls printer settings for the printer you select in the Printers list. The available options vary depending on the printer driver.

Paper Size
Select the paper size on which you want to print.

Paper Source
Select the paper source on which you want to print.

Orientation
Select the page orientation: portrait (vertical) or landscape (horizontal).

Bullet List
Select this option for a bullet listing of the documents selecting for printing.

Verbose
Select this option for a detailed listing of the documents selecting for printing.

Recent File

This area is where Visual Intercept displays a list of the most recently opened Visual Intercept files.

Exit Command

Ends a Visual Intercept session. Visual Intercept prompts you to save any unsaved changes to Visual Intercept files and to insert or update any Visual Intercept documents to the Visual Intercept data source.

To exit Visual Intercept, do one of the following:

- From the Menu bar, click <u>F</u>ile, and then click E<u>x</u>it.
- Press ALT + SPACEBAR to open the <u>Application Control menu</u> , and then click Close.
- Double-click the Application Control menu box.

Undo Command

Reverses the last text-editing action. Unavailable if there is no previous text-editing action or if reversing the previous action is not possible.

Cut Command

Removes the selection and copies it to the Clipboard.

Unavailable if nothing is selected.

Copy Command

Copies the selection into the Clipboard.   Unavailable if nothing is selected.

Paste Command

Inserts a copy of the Clipboard contents at the insertion point. Unavailable if nothings is on the clipboard.

Find Command

Replace (Search Menu)

Insert Command

This action will place the active document into a common data source.

1. To insert a Visual Intercept document, first <u>create</u> a new Visual Intercept document and then do one of the following:

   - From Menu bar, click <u>D</u>atasource, and then click <u>I</u>nsert.

   - Press CTRL+I.

   - From the Main toolbar, click the Insert shortcut button .

   - Close the Visual Intercept document window, and follow the prompts.

2. The Visual Intercept document is now inserted into the common data source and can be shared by other Visual Intercept users.

Refresh Command

This action will re-fetch the active document from the Visual Intercept System.

To refresh   a Visual Intercept document:

1. Select a document.

2. Do one of the following:

    - From the Menu bar, click Datasource, and then click Refresh.

    - Press CTRL+R.

    - Click the refresh shortcut button on the Main toolbar.

3. The Visual Intercept document has now been re-fetched from the common data source.

Update Command

Updating a Visual Intercept document places a modified document into a common data source. Once updated, the modified document is available to other Visual Intercept users.

1. To update a Visual Intercept document, fetch and modify a document and then do one of the following:

   - From the Menu bar, click <u>D</u>atasource and then click <u>U</u>pdate.

   - Press CTRL+U.

   - From the Main toolbar, click the Update shortcut button .

   - Close the Visual Intercept document window and follow the prompts to update the document.

2. The changes to the Visual Intercept document have now been placed into a common data source and can be shared by other Visual Intercept users.

Delete Command

This action will remove the active document from the common data source. Once deleted, the document cannot be shared by other Visual Intercept users.

1. To delete a Visual Intercept document, select a document and then do one of the following:

    -   From the Menu bar, click <u>D</u>atasource, and then click <u>D</u>elete.

    -   Press CTRL+D.

    -   From the Main toolbar, click the Delete shortcut button ![X]().

2. From the Delete dialog box, click No to delete the selected Visual Intercept document.

Help Menu Commands

The Help menu commands provide Help on using Visual Intercept and Help on specific Visual Intercept commands. In addition, context sensitive help is provided by pressing F1 at any time to view Help on the currently selected menu item or dialog box.

Help Command Action

Contents   Runs Help and displays the Visual Intercept Table of Contents

Using Help   Runs Help and displays information on Windows Help topics

Tip of the Day

This command allows you to review additional tips, and show the Tip-of-the-Day when first starting a Visual Intercept session.

Context Help

Context sensitive help is available in Visual Intercept.

1. Click the Help shortcut button on the Main toolbar.

2. Drag the cursor to the item where you want help.

3. Click for help.

About Visual Intercept

This command provides Visual Intercept version, copyright, and serial number information.

Editing Text

You can use the standard Clipboard commands, Cut, Copy, and Paste to remove, duplicate, and move selected strings of characters. You can also undo your previous editing action.

The commands you use for these actions are active only when you can use them: Undo when there is an action to undo, Cut and Copy when there is a selection to put on the Clipboard, and Paste when there is something on the Clipboard.

To undo the last editing action:

From the Menu bar, click Edit and then click Undo.

To remove text and place it on the clipboard:

1. Select the text.

2. From the Menu bar, click Edit and then click Cut.

To place a copy of text on the clipboard:

1. Select the text

2. From the Menu bar, click Edit and then click Copy.

To insert a copy of the Clipboard contents at a given location:

1. Place the insertion point at the location.

2. From the Menu bar, click Edit and then click Paste.

New Window Command

Opens a new window with the same contents as the active window. This is helpful if you wish to display several Views of a single Visual Intercept document.

Cascade Command

Arranges all open windows so that the title bars remain visible.

Tile Command

Arranges all open windows vertically and horizontally.

Arrange Icons Command

Arranges the icons at the bottom of the application window.

Close All Command

This command closes all open windows.

Toolbar Command

Toggle to display or hide the Main [Toolbar](#).

Status Bar Command

Toggle to display or hide the Status Bar at the bottom of the application window.

Exporting Visual Intercept Data

see also: Options

You can export all, or part, of a Visual Intercept document type, to a file, by using the export utility in Visual Intercept.

To export Visual Intercept document information, do the following:

1. From the Main menu, click <u>F</u>ile and then click <u>E</u>xport.

2. From the dialog box, select the Visual Intercept documents you wish to export, and then click OK.

3. From the Export Intercept dialog box, click the appropriate parameters, data fields, and template tabs to enter exporting information and then click the OK button. See options for details on each of these tabs.

4. From the Save As dialog box, name the file containing the exported data.

Importing Visual Intercept Data

You can import data from other Visual Intercept data sources or from other databases containing important Visual Intercept document information. To import additional data into a Visual Intercept database, you must know what data you want, how the incoming data is organized, and where in the Visual Intercept database want to put the imported data.

The importing utility allows you to insert data directly into a Visual Intercept database.

To import data into your Visual Intercept database, do the following:

1. From the Main ,menu, click <u>F</u>ile and then click <u>I</u>mport.

2. Select a document type from the Import Dataset dialog box and then click OK.

   Note: Choose a Visual Intercept document in the Visual Intercept database where you want the incoming data to be inserted.

3. From the Importing Visual Intercept Document dialog box, click the appropriate template, parameter, data mapping, recovery, and default information tabs to enter importing information and then click the OK button. See options   for details on each of these tabs.

Importing and Exporting Options

To import data into a common data source, you must define what data you want, how the incoming data is organized, and where in the Visual Intercept database you want to put the imported data.

To export Visual Intercept data, you must define what type of Visual Intercept document contains the data, how the data will be delimited, and what fields will be exported.

The following table provides the terminology and definitions for this information.

Tab	Elements	Definitions
Template	Template	A file containing a specific set of import or export parameters, data mapping, recovery parameters, and defaults. This can be very useful if you periodically import from, or export to, a common database.
	Description	Identifies the template.
Parameters	Text delimiter	How data within a field is separated.
	Field delimiter	How fields within a database are separated.
	Null Value	How null values are defined.
Data Map	Database fields	Identifies the name and order of the fields being exported or imported.
Recovery	Reject with unknown parameters	If unknown parameters are encountered, the record in the database is skipped.
	Fail unknown parameters	If unknown parameters are encountered, the entire importing or exporting operation is aborted.
	Default unknown parameters	When unknown parameters are encountered, default parameters are inserted.
Defaults	Specific Intercept document defaults	The default parameters to use when unknown values or empty fields are encountered.

Trouble reading the tips file

Visual Intercept is unable to access the ISTIPS.TXT file.

To Recover

1. Check the directory location where Visual Intercept was installed and verify that the file ISTIPS.TXT still exists.

2. If the file istips.txt does not exist, you can restore the file by reinstalling the Visual Intercept Client software.

3. Contact technical support.

Can not open clipboard

Visual Intercept can not open the clipboard and is unable to perform any clipboard operations.

To Recover

1. Close other running applications and retry operation.

2. Restart the Visual Intercept application and retry operation.

3. Reboot your machine and retry operation.

4. Contact technical support.

Can not close clipboard

Visual Intercept can not close the clipboard and is unable to perform any clipboard operations.

To Recover

1. Close other running applications and retry operation.

2. Restart the Visual Intercept application and retry operation.

3. Reboot your machine and retry operation.

4. Contact technical support.

Invalid password

The specified password is invalid for this userID on this network.

To Recover

1. Contact your system administrator and verify the network password.

2. Contact technical support.

No network present

Visual Intercept can not perform this network action because there is no network present.

To Recover

1. Check with your system administrator for possible network or system problems.

2. If your data source is specified using a mapped network drive, make sure your machine can attach to that network drive.

3. Contact technical support.

Not enough memory to perform this operation

The current operation requires more memory than is currently available on your machine.

To Recover

1. Close other running applications and retry operation.

2. Restart the Visual Intercept application and retry operation.

3. Reboot your machine and retry operation.

4. Contact technical support.

Unable to read drive

Visual Intercept is unable to read from the specified drive.

To Recover

1. Make sure the drive is available by going to File Manager or it's equivalent and refresh the directory for that drive.

2. Make sure the drive door is closed.

3. Make sure the disk is formatted and free of errors.

4. For network drives, make sure you have read permissions.

5. Contact   technical support.

Can not convert template

Unable to convert from the specified template type to the new type of template.

To Recover

Contact [technical support](#).

Source is already attached

The SCCS file is already attached to this Incident. If you wish to remove the SCCS file relationship, select the SCCS file and click Remove.

Document is already attached

The file is already attached to this Incident. If you wish to remove the file relationship, select the file and click Remove.

Can not access data source

Visual Intercept can not access the specified data source. The data source connection has been broken by some external event.

To Recover

1. Restart the Visual Intercept application and retry operation.

2. Reboot your machine and retry operation.

3. Contact [technical support](#).

Permission denied for this action

You do not have the required permissions to complete this action. Visual Intercept security provides controlled access to Insert, Delete, Update, and Fetch privileges on Accounts, Contacts, Incidents, and Projects. You can determine which rights you have on a document by selecting that document and looking at the status bar, speed bar, or the Data Source menu options. You may have an action denied because of a hierarchical relationship. For example, you can not delete a Project (even if you have delete privileges) if an Incident is attached, and you do not have Incident delete privileges.

To Recover

1. Contact the Visual Intercept administrator for the desired permissions.

2. Contact technical support.

Bad memory error

Visual Intercept encountered a bad memory error when attempting the current operation. This is a result of an unstable application.

To Recover

1. If possible, reboot your machine and try the operation again.

2. Regardless, contact technical support.

Not logged into document manager

Your userID was unable to log into the document manager. Therefore, related documents can not be entered or accessed.

To Recover

1. Make sure you have specified the correct document manager integration information. From the Menu bar, click Edit, click Preferences, and then click the Integration tab. Verify that the Document section has the correct entries.

2. Contact [technical support](.).

Deletion of document failed

Visual Intercept was unable to delete the specified related document.

To Recover

1. Verify the document still exists.

2. Verify the document is closed.

3. Verify you have delete privileges on the document manager drive.

4. Contact technical support.

Document copy operation failed

Visual Intercept was unable to copy the specified related document.

To Recover

1. Verify the document still exists.

2. Verify the document is closed.

3. Verify you have read/write privileges on the document manager drive.

4. Contact [technical support](#).

Document access denied

Visual Intercept was unable to access the specified related document.

To Recover

1. Verify the document still exists.

2. Verify the document is closed.

3. Verify you have read/write privileges on the document manager drive.

4. Contact technical support.

Invalid document

Visual Intercept was unable to access the specified related document.

To Recover

1. Verify the document still exists.

2. Verify the document is closed.

3. Verify you have read/write privileges on the document manager drive.

4. Contact technical support.

Invalid document path

The directory path specified is invalid. It is possible that the Documents directory was never configured for a new data source or an existing directory was moved for administrative reasons. The server path is the location where your related documents are permanently kept for common access by all users of Visual Intercept on a per data source basis. This means there is a different Documents directory for each active Visual Intercept data source in use by your organization.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Documents directory to point to the appropriate document directory for this Intercept data source.

3. If this does not work, contact technical support.

Invalid document client path

The client directory path specified is invalid. This is usually a result of an incorrect configuration for the current data source It is possible that the Documents directory was never configured for a new data source or an existing directory was moved for administrative reasons. The server path is the location where your related documents are permanently kept for common access by all users of Visual Intercept on a per data source basis. This means there is a different Documents directory for each active Visual Intercept data source in use by your organization.

The client path is a local directory where related documents are temporarily copied when you launch the related document.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Documents directory to point to the appropriate document directory for this Intercept data source.

3. If this does not work, contact technical support.

Invalid document server path

The server directory path specified is invalid. This is usually a result of an incorrect configuration for the current data source. It is possible that the Documents directory was never configured for a new data source or an existing directory was moved for administrative reasons. The server path is the location where your related documents are permanently kept for common access by all users of Visual Intercept on a per data source basis. This means there is a different Documents directory for each active Visual Intercept data source in use by your organization.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Documents directory to point to the appropriate document directory for this Intercept data source.

3. If this does not work, contact technical support.

Invalid document source path

The source path specified for the current operation is invalid. This is usually a result of a missing file in the document directory or an incorrect configuration for the current data source. It is possible that the Documents directory was never configured for a new data source or an existing directory was moved for administrative reasons. The server path is the location where your related documents are permanently kept for common access by all users of Visual Intercept on a per data source basis. This means there is a different Documents directory for each active Visual Intercept data source in use by your organization.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Documents directory to point to the appropriate document directory for this Intercept data source.

3. If this does not work, contact technical support.

Invalid document destination path

The destination path specified for the current operation is invalid. This is usually a result of an incorrect configuration for the current data source. It is possible that the Documents directory was never configured for a new data source or an existing directory was moved for administrative reasons. The server path is the location where your related documents are permanently kept for common access by all users of Visual Intercept on a per data source basis. This means there is a different Documents directory for each active Visual Intercept data source in use by your organization.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Documents directory to point to the appropriate document directory for this Intercept data source.

3. If this does not work, contact <u>technical support</u>.

Failed to log into source code control system

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the userID and password are incorrect for your SCCS. Visual Intercept is integrated with, but not administrating your SCCS. This means we do not control creation and maintenance of your SCCS userID. An inability to log into your SCCS may be a result of administration of your source code control system.

To Recover

1. Verify that your userID and password are correct for your source code control system.

2. If your userID and password are correct then click Edit from the Menu bar, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the appropriate SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

Not logged into SCCS

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the userID and password are incorrect for your SCCS. Visual Intercept is integrated with, but not administrating your SCCS. This means we do not control creation and maintenance of your SCCS userID. An inability to log into your SCCS may be a result of administration of your source code control system.

To Recover

1. Verify that your userID and password are correct for your source code control system.

2. If your userID and password are correct, click Edit from the Menu bar, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the appropriate SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

Can not access SCCS

The current operation requires information from your source code control system (SCCS) but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the userID and password are incorrect for your SCCS. Visual Intercept is integrated with, but not administrating your SCCS. This means we do not control creation and maintenance of your SCCS userID. An inability to log into your SCCS may be a result of administration of your source code control system.

To Recover

1. Verify that your userID and password are correct for your source code control system.

2. If your userID and password are correct, click Edit from the Menu bar, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the appropriate SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

SCCS permission denied

The current operation requires information from your SCCS but was unable to access the SCCS because the userID specified in the Preferences tab dialog did not have the required permissions. Contact your SCCS system administrator to determine what source code control system privileges you have.

To Recover

1.   Contact your SCCS system administrator.

2.   If this does not work, contact technical support.

Invalid SCCS path

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If the operation does work directly within the source code control system, click Edit from the Menu bar, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the appropriate SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

Invalid SCCS server path

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If the operation does not work directly within the source code control system, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the correct, valid SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

Invalid SCCS client path

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If the operation does not work directly within the source code control system, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the correct, valid SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the SRCSAFE.INI file.

4. If this does not work, contact technical support.

Invalid SCCS file path

The current operation requires information from your SCCS but was unable to access the SCCS. This is usually a result of an incorrect configuration for the current data source. It is possible that the SCCS directory was never configured for a new data source or an existing SCCS directory was moved for administrative reasons. The SCCS directory is the location of your organization's source code control system. There is potentially a different SCCS directory for each active Visual Intercept data source in use by your organization.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If the operation does not work directly within the source code control system, click Preferences, and then click the Interfaces tab.

3. Edit the Source Code Control path to point to the correct, valid SCCS directory for this Intercept data source. For Visual SourceSafe, this would be the directory that contains the <u>SRCSAFE.INI</u> file.

4. If this does not work, contact <u>technical support</u>.

SCCS load failure

The current operation requires information from your SCCS but was unable to load the SCCS integration application components. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

To Recover

Immediately contact technical support.

SCCS initialization failure

The current operation requires information from your SCCS but was unable to initialize the SCCS. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact [technical support](#).

SCCS information retrieval failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information open failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information close failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information read failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information update failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information get file failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

SCCS information uncheckout failure

The current operation requires information from your SCCS but was unable to successfully finish. This is usually a result of an unsupported version of the SCCS in which changes have been made to the SCCS interface. This normally requires direct action by the Visual Intercept development team.

It is also possible that the SCCS is configured improperly and this operation would fail directly within the source code control system.

To Recover

1. Verify the operation would work directly within the source code control system.

2. If this does not work, contact technical support.

Could not find report

The current operation requires the use of a pre-defined report file. This is usually a result of an incorrect configuration for the current data source. It is possible that the Reports directory was never configured for a new data source or an existing directory was moved for administrative reasons. The Reports directory is the location your Visual Intercept report files are kept for on a per data source basis. This means there is potentially a different Reports directory for each active Visual Intercept data source in use by your organization.

To Recover

1. From the Menu bar, click Edit, click Preferences, and then click the Integration tab.

2. Edit the Reports directory to point to the appropriate report directory for this Intercept data source.

3. If this does not work, contact technical support.

Could not find report server

The current operation failed because the Report engine could not be found. This is usually a result of an incomplete installation or a corrupted application component.

To Recover

1. Reinstall Visual Intercept.

2. If this does not work, contact technical support.

Could not find report engine

The current operation failed because the Report engine could not be found. This is usually a result of an incomplete installation or a corrupted application component.

To Recover

1. Reinstall Visual Intercept.

2. If this does not work, contact technical support.

Must have Default Printer

The current operation requires a default printer be specified. Go to the Control Panel and select Printers. Set the default printer to be the printer you wish to use to print the report. Retry the operation.

To Recover

1. Go to your computer system's Control Panel
2. Select Printers
3. Set the desired default printer.
4. If this does not work, contact technical support.

Invalid UserID

The specified userID is invalid on this data source.

To Recover

1. Visual Intercept userIDs are case sensitive. Make sure the caps lock key is not on and reenter the userID.

2. Contact your system administrator and have them assign a known userID.

3. If this does not work, contact [technical support](#).

Invalid Password

The specified password is invalid for this userID on this data source.

To Recover

1. Visual Intercept passwords are case sensitive. Make sure the caps lock key is not on and reenter the password.

2. Contact your system administrator and have them assign a known password.

3. If this does not work, contact technical support.

Invalid Server

The directory path specified as the Visual SourceSafe directory is incorrect or could not be found.

To Recover

1. Change the directory path to Visual SourceSafe to the one that contains the file SRCSAFE.INI.

2. If this does not work, contact technical support.

Unknown Application Error

The current operation failed due to an unknown application error.

To Recover

Contact technical support.

Directory does not exist

The specified directory does not exist.

Mail load failure

The current operation requires access to your electronic mail system but was unable to load the electronic mail integration application components. This is usually a result of an unsupported electronic mail product or version in which changes have been made to the electronic mail interface. This normally requires direct action by the Visual Intercept development team.

To Recover

Immediately contact technical support.

Unknown Mail error

The current operation failed due to an unknown mail integration error.

To Recover

1. Verify that your electronic mail system is currently running and can be accessed directly.

2. If this does not work, contact [technical support](#).

Can not attach related document or source file to Mail

The current operation failed because a related document or related SCCS file could not be attached to the electronic mail form.

To Recover

1. Verify that your electronic mail system is currently running and can be accessed directly.

2. Verify the related document is available.

3. Verify the related SCCS file is available.

4. If this does not work, contact technical support.

Can not CC: related contact in Mail

The current operation failed because a related Contact could not be copied on the electronic mail form.

To Recover

1.   Verify the Contacts email address is correct.

2.   If this does not work, contact <u>technical support</u>.

Mail text was too large

The current operation failed because the message was too large.

To Recover

Contact technical support.

Must logon with Administrator userID

You are attempting to log into Visual Intercept to perform administrator only functions. You must use the administrator userID and password. Only the Visual Intercept Administrator is able to Insert, Delete, and Modify users, security groups, and to configure system parameters.

To Recover

1. Verify that you are using the correct administrator userID and password.

2. If this does not work, contact technical support.

Invalid SCCS userID

To Recover

Contact technical support.

Invalid SCCS password

To Recover

Contact [technical support](#).

Data no longer exists in the data source

The current operation attempted to fetch, modify, or delete data that is no longer in the Visual Intercept data source. It is likely that another Visual Intercept user has deleted the data since the time you originally fetched the information from the data source.

In a multi-user environment, there can be a lag between the time data is deleted from the server and all the relevant users are notified. This message is a result of normal, expected, use of Visual Intercept.

Can not create directory

The directory path specified as the Visual SourceSafe directory is incorrect or could not be found.

To Recover

1. Change the directory path to Visual SourceSafe to be the one that contains the file SRCSAFE.INI.

2. If this does not work, contact technical support.

The specified file was not found

The specified file which Intercept is trying to access was not found.

To Recover

1. Make sure the directory path is correct and the file exists.

2. If this does not work, contact [technical support](#).

The specified path was not found

The specified path which Visual Intercept is trying to access was not found.

To Recover

1. Make sure the directory path is correct for the document or executable file Intercept is trying to access.

2. If this does not work, contact technical support.

The .EXE file is invalid

The specified executable which Visual Intercept is trying to open was found to be a non-Win32 .EXE or there is an error in the .EXE image.

To Recover

1. If you suspect the .EXE may be corrupt, if possible, reinstall this application.

2. If the .EXE file is a non-Win32 .EXE Intercept will be unable to open the file.

The filename association is incomplete or invalid

The specified file which Visual Intercept is trying to access can not be open or printed since the filename extension is invalid or incomplete.

To Recover

1. If possible, add the appropriate file extension so Intercept can access it successfully.

2. If this does not work, contact <u>technical support</u>.

The DDE transaction could not be completed

The DDE transaction could not be completed because other DDE transactions were being processed.

To Recover

1. Wait a few minutes and try the operation again.

2. If this does not work, contact your system administrator for possible network problems.

The DDE transaction failed

The DDE transaction could not be completed.

To Recover

1. Wait a few minutes and try the operation again.

2. If this does not work, contact your system administrator for possible network problems.

The DDE transaction could not be finished

The DDE transaction could not be completed because the request timed out.

To Recover

1. Wait a few minutes and try the operation again.

2. If this does not work, contact your system administrator for possible network problems.

There is no application associated with the given filename extension

The specified file which Visual Intercept is trying to launch can not be opened or printed because there is either no application association with that file extension or the associated application does not exist. For example, a *.doc file is typically associated with Microsoft Word.

To Recover

1. Verify that the document has an association with an application through File Manager or Explorer.

2. If there is an association, verify the associated application exists.

3. If there is an association and the application, verify that the document can be launched from File Manager or Explorer.

4. If this does not work, contact technical support.

A sharing violation occurred

The specified file could not be opened or printed due to a sharing violation.

To Recover

1. Wait a few minutes and try the operation again.

2. If this does not work, close the file if you have it opened.

3. If this does not work, contact your system administrator for possible system problems.
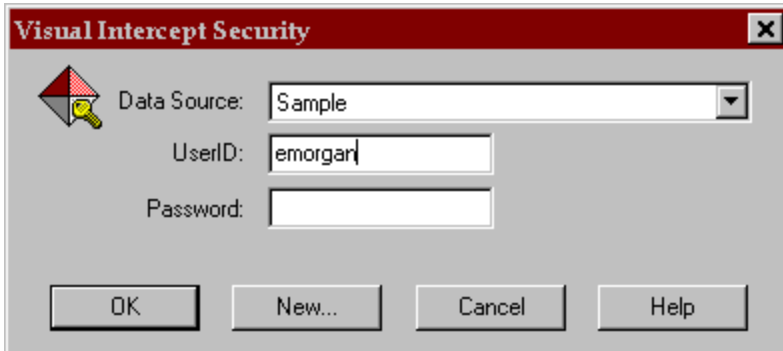
DDE transaction error unknown

The DDE transaction could not be completed due to an unknown error.

To Recover

1. Contact your system administrator for possible network or system problems.

2. If the problem continues, please contact <u>technical support</u>.

Visual Intercept Security

Visual Intercept Security ✕

Data Source: Sample

UserID: emorgan

Password:

[OK] [New...] [Cancel] [Help]

To logon to a Visual Intercept Data Source.

1. In the Data Source drop-down list, select the correct data source for your Visual Intercept data.

2. In the UserID box, type your Visual Intercept user name.

3. In the Password box, type your Visual Intercept password (if you have one), and then click the OK button.

Notes

1. If you are unsure whether your Visual Intercept data source is listed, contact your Visual Intercept administrator or setup up a new data source by pressing the **New** button.

2. If you are unsure of your Visual Intercept user name or password, see your Visual Intercept administrator.

Account Document

A Visual Intercept Account is used to identify financial responsibility for a Visual Intercept Project. Each Account document contains information relating to a single account   such as the Project(s) charged against it, description of the Account, and related Contacts. As you enter information regarding a specific Account, the Visual Intercept Manager builds an Account document for that Account.

Once an Account document has been inserted into a common data source it can be shared by other Visual Intercept users. You can relate an Account to a Project by attaching the Account to a Project document. You can also relate one or more Contacts to an Account by attaching the Contact(s) to an Account document.

Note: A single Account can be related to several Projects. However, a Project can have only one Account attached.

Account Document Views:

Views can be displayed by clicking the respective tabs located just above the Header.

- Account Document Header

- Contacts View

- Description View

- Projects View

Working with Account Documents:

- Creating

- Inserting

- Updating

- Deleting

- Opening

- Saving

Relating Account Documents

- Relating Projects to Accounts

- Relating Contacts to Accounts

Fetching Account Documents

- Custom Queries

- Redisplaying

- Refreshing

Communication

- [Exporting](#)
- [Importing](#)
- [Sending](#)

Account Document Header

This view of an Account document displays the name of the Account, the Account code, and the [Account Representative](#) .

Account Document Projects View

This view of an Account document displays the Projects that are charged against a specific Account. From the Project View of an Account, you can attach, detach, and launch Projects.

Account Document Description View

This view of an Account document displays descriptive information regarding an Account.

Account Document Contacts View

This view of an Account document displays Account related Contacts. From the Contacts View of an Account, you can attach, detach, and launch related Contacts.

Visual Intercept Browser

See also: Visual Intercept Manager

The Visual Intercept Browser provides a visual representation of your project hierarchy , via a project tree, and allows you to navigate through the Visual Intercept database. The Browser toolbar contains shortcut buttons which allow you to fetch Visual Intercept documents either globally or via custom queries.

For more details on the project tree and toolbar, refer to the illustration below. Just place the cursor in the area you wish to explore, and click.
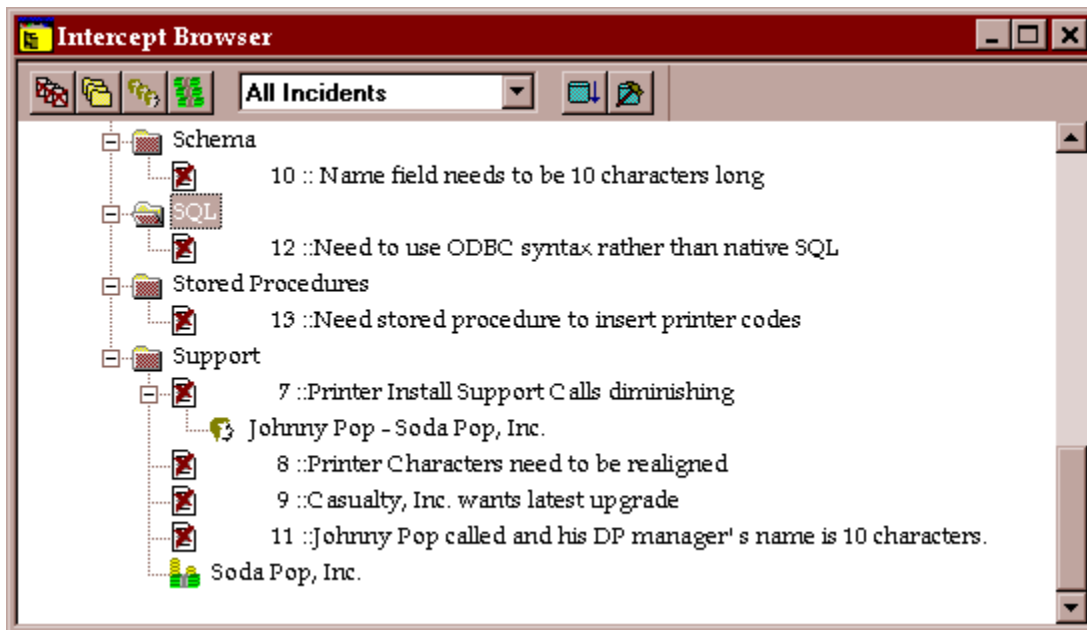
Project icon

This is a visual representation of a Project document.

A **Green** project icon indicates the Project has no incidents associated with it.

A **Red** project icon indicates the Project has at least one associated incident.

A **Yellow** project icon indicates the Project has a child project with at least one associated incident.

A **Plus sign** indicates the document is condensed and there are associated Visual Intercept documents. Click the plus sign to expand the project icon and see the other documents.

A **Minus sign** indicates the document is fully expanded.

Project Tree

This is a visual representation of your project hierarchy.

Incident icon

This is a visual representation of an Incident document. Although an Incident must be related to one Project, it can be attached to other Incidents.

A **Plus sign** indicates the document is condensed and there are associated Visual Intercept documents. Click the plus sign to expand the project icon and see the other documents.

A **Minus sign** indicates the document is fully expanded.

Contact icon

This is a visual representation of a Contact document. A Contact can be related to an Incident or Account.

Account icon

This is a visual representation of an Account document. An Account can only be related to Projects. Although a Project can have only one Account attached, an Account can be related to many Projects.

A **Plus sign** indicates the document is condensed and there are associated Visual Intercept documents. Click the plus sign to expand the project icon and see the other documents.

A **Minus sign** indicates the document is fully expanded.

Fetch all Incidents

This command will fetch all Incident documents from the common data source. Depending on the configuration of your system and the size of your network, this could affect performance.

Fetch all Projects

This command will fetch all Project documents from the common data source. Depending on the configuration of your system and the size of your network, this could affect performance.

Fetch all Accounts

This command will fetch all Account documents from the common data source. Depending on the configuration of your system and the size of your network, this could affect performance.

Fetch all Contacts

This command will fetch all Contact documents from the common data source. Depending on the configuration of your system and the size of your network, this could affect performance.

Build Custom Query

This command will launch the Visual Intercept Query Builder. From here you can build custom queries.

See also: How to build Custom Queries

Execute Custom Query

This command will execute the custom query displayed in the Query Window.

Custom Query drop-down list

This drop-down list displays your custom queries. Click the drop-down list, select the name of your custom query, and then click the Execute custom query button.

Visual Intercept Browser Navigation

Launching a Visual Intercept Document

You can easily launch a Visual Intercept document from the project tree. Simply place the cursor over the icon and then double-click!

Visual Intercept Document relationships

You can change relationships among Visual Intercept documents from the project tree by dragging and dropping the appropriate icons.

See also: Relating Visual Intercept Documents

Query Window

The Query Window displays the Query name from the drop-down list. To execute the query displayed, click the Build Query button.

Contact Document

Each Contact document contains information relating to a specific contact such as their name, address, telephone numbers, fax numbers, email address, etc. As you enter information regarding a specific Contact, the Visual Intercept Manager builds a Contact document for that Contact. To share Contact information, you insert the Contact document into a common data source.

Once a Contact document has been inserted into a common data source, it can be shared by other Visual Intercept users. You can relate a Contact to an Incident or Account by attaching the Contact document to the respective Incident or Account document.

Information in a Contact document is displayed in a Header and four unique views. The unique views can be displayed via the tabs located just above the Header in the Contact document.

Contact Document Views:

Views can be displayed by clicking the respective tabs located just above the Header.

- Contact Header
- Contact Address
- Contact Communication
- Contact Description
- Incidents View

Working with Contact Documents:

- Creating
- Inserting
- Updating
- Deleting
- Opening
- Saving

Fetching Contact Documents

- Custom Queries
- Redisplaying
- Refreshing

Communication

- Exporting
- Importing
- Sending

Contact Header

The Contact Header displays the first and last name of the Contact and Contact type. A Contact type could be a beta tester, customer, employee, etc.

Contact Address

The address view displays the company name and address and the department and title of a Contact.

Contact Communication

The communication view of a Contact document displays telephone numbers, fax numbers, and email address of a Contact.

Contact Description

The description view displays descriptive information regarding a Contact.

Incidents View

The Incidents view displays a list of all Incidents related to a specific Contact. From the Incidents View of a Contact document, you can attach, detach, and launch related Incidents.

Edit Menu

These commands allow you to easily work with text and set your preferences in Visual Intercept.

[Undo Command](#)

[Cut Command](#)

[Copy Command](#)

[Paste Command](#)

[Preferences](#)

File Menu

The following are commands available from within the Visual Intercept File menu.

New Command

Open Command

Close Command

Save Command

Save As Command

Save All Command

Send Command

Import Command

Export Command

Print Command

Print Preview

Print Graph

Print Setup Command

Recent File

Exit Command

Print Graph Command

To create and print an Incident graph from the Main Menu, do the following:

1. Click File, and then click Print Graph.

2. Select one of the following information from the **Incident** options.

    - **All Documents** - to graph all Incidents in the common data source.

    - **Selected Documents** - to graph only Incidents previously selected from an Incident query list.

    - **Query Documents** - to select from the drop-down list or click Build to use the Query Builder .

3. Enter the following information in the **Format** options.

    - Type - Select a graph type from the drop-down list.

    - Totals - Select the interval total from the drop-down list (day, week, month, quarter, or year).

    - From - Select a start date from the drop-down list or enter a specific date.

    - To - Select an end date from the drop-down list or enter a specific date.

4. Select the 2nd axis for your Incident graph in the **Graph** options.

5. Do one of the following:

    - To preview the graph, click the Preview button.

    - To print the graph, click the Print button.

    - To cancel the operation, click the Cancel button.

Graph Options Dialog Box

This is the dialog box for creating and printing graphs.

To create and print an Incident graph, do the following:

1. Select one of the following information from the **Incident** options.

    - **All Documents** - to graph all Incidents in the common data source.

    - **Selected Documents** - to graph only Incidents previously selected from an Incident query list.

    - **Query Documents** - to select from the drop-down list or click Build to use the <u>Query Builder</u> .

2. Enter the following information in the **Format** options.

    - Type - Select a graph type from the drop-down list.

    - Totals - Select the interval total from the drop-down list (day, week, month, quarter, or year).

    - From - Select a start date from the drop-down list or enter a specific date.

    - To - Select an end date from the drop-down list or enter a specific date.

3. Select the 2nd axis for your Incident graph in the **Graph** options.

4. Do one of the following:

    - To preview the graph, click the Preview button.

    - To print the graph, click the Print button.

    - To cancel the operation, click the Cancel button.

Incident Document

An Incident document contains information relating to a single incident . As you enter information regarding a specific Incident, Visual Intercept builds the Incident document.

An Incident must be related to one, and only one, Project. Therefore, prior to registering an Incident, you must have created at least one Project. You can move an Incident from Project to Project as you learn more about it. The Incident history will retain this information.

For more complicated Incidents, you can easily attach   additional documents. Graphs, figures, and tables that can help illustrate and resolve an Incident are readily available from the applications that created them. You can even attach specific source code files from your source code control system (SCCS). Once source code is attached to an Incident document, you can easily work with your SCCS from within Visual Intercept.

Incident Document Views:

Views can be displayed by clicking the respective tabs located just above the Header.

- Incident Document Header
- Attributes View
- Contacts View
- Description View
- Documents View
- General View
- Incident History View
- Incidents View
- Resolution View
- SCCS View
- Workaround View

Working with Incident Documents:
- Creating
- Inserting
- Updating
- Deleting
- Opening
- Saving

Relating Incident Documents
- Relating 3rd Party Documents
- Relating Contacts to Incident

- [Relating Incidents to Incidents](#)
- [Relating Source Code](#)

Fetching Incident Documents

- [Custom Queries](#)
- [Redisplaying](#)
- [Refreshing](#)

Communication

- [Exporting](#)
- [Importing](#)
- [Sending](#)

Incident Document Header

The Header of the Incident document is displayed in the top half of the Incident document window. The Header in each Incident document contains four common fields.

- Project
- Version
- Incident
- Subject

Attributes View

The attributes view displays those Visual Intercept users who have responsibility for an Incident and specific Incident attributes.

Visual Intercept users:

- [Requested User](#)

- [Assigned User](#)

- [Modified](#)

Incident Attributes:

- [Category](#)

- [Priority](#)

- [Severity](#)

- [Status](#)

Incident Document General View

The General view displays a combination of the <u>Attributes View</u> and <u>Incident Document Description View</u> .

Incident Document Description View

A written description of the Incident such as: What occurred, and how, where, and when it occurred?   Visual Intercept provides a time and date stamp when the description view is edited.

Incident History

The Incident history view displays a history of an Incident from discovery to date. The Incident history view is **read-only**.

Incident Document SCCS View

see also: [Relating Source Code to an Incident](#)

This view displays source code in the source code control system (SCCS) that is related to an Incident. If you have source code control system privileges, you can check in and check out source code files from within Visual Intercept.

Incident Document Documents View

see also: <u>Relating 3rd Party Documents to Incidents</u>

This view displays any 3rd party documents (*e.g.*, MS Word, Excel, or text files) that may pertain to this Incident. From the Documents View in an Incident document, you can attach, detach, and launch 3rd party documents.

Incident Document Workaround View

This view displays a description of how you can work around this Incident until it is resolved.

Incident Document Resolution View

This view displays how the Incident was resolved.

Incident Document Contacts View

see also: <ins>Relating Contacts to Incident Documents</ins>

This view displays any related <ins>contacts</ins> associated with an Incident and/or people who need to know about this Incident. From the contacts View in an Incident document, you can attach, detach, and launch Contacts.

Incidents Document Incidents View

This view displays any *related* Incidents associated with an Incident. From the Incidents View in an Incident document, you can attach, detach, and launch related Incidents.

Visual Intercept Manager Menu Bar

The following menu items are available from the Manager menu bar.

[File Menu](#)

[Edit Menu](#)

[Search Menu](#)

[Datasource Menu](#)

[Actions Menu](#)

[Window Menu](#)

[Help Menu](#)

Datasource Menu

The following commands are available from the <u>D</u>atasource menu. These commands allow you to move Visual Intercept documents to and from a common data source.

[Insert Command](#)

[Refresh Command](#)

[Update Command](#)

[Delete Command](#)

Search Menu

The following commands are available from the Search menu. These commands allow you to build and execute queries to a data source.

[Execute Query Command](#)

[Intercept Query Builder](#)

Window Menu

The following commands are available from the Window Menu

[New Window Command](#)

[Cascade Command](#)

[Tile Command](#)

[Arrange Icons Command](#)

[Close All Command](#)

[Browser Window Command](#)

[Accounts Window Command](#)

[Contacts Window Command](#)

[Incidents Window Command](#)

[Projects Window Command](#)

[Notification Window Command](#)

---

[Toolbar Command](#)

[Status Bar Command](#)

Visual Intercept Manager

See also: Visual Intercept Browser

The Visual Intercept Manager is the main working window of Visual Intercept. The illustration below displays the Visual Intercept Manager's Menu and toolbar. For details on the functionality of the Menu items and toolbar shortcut buttons, just click the area where you want to explore.
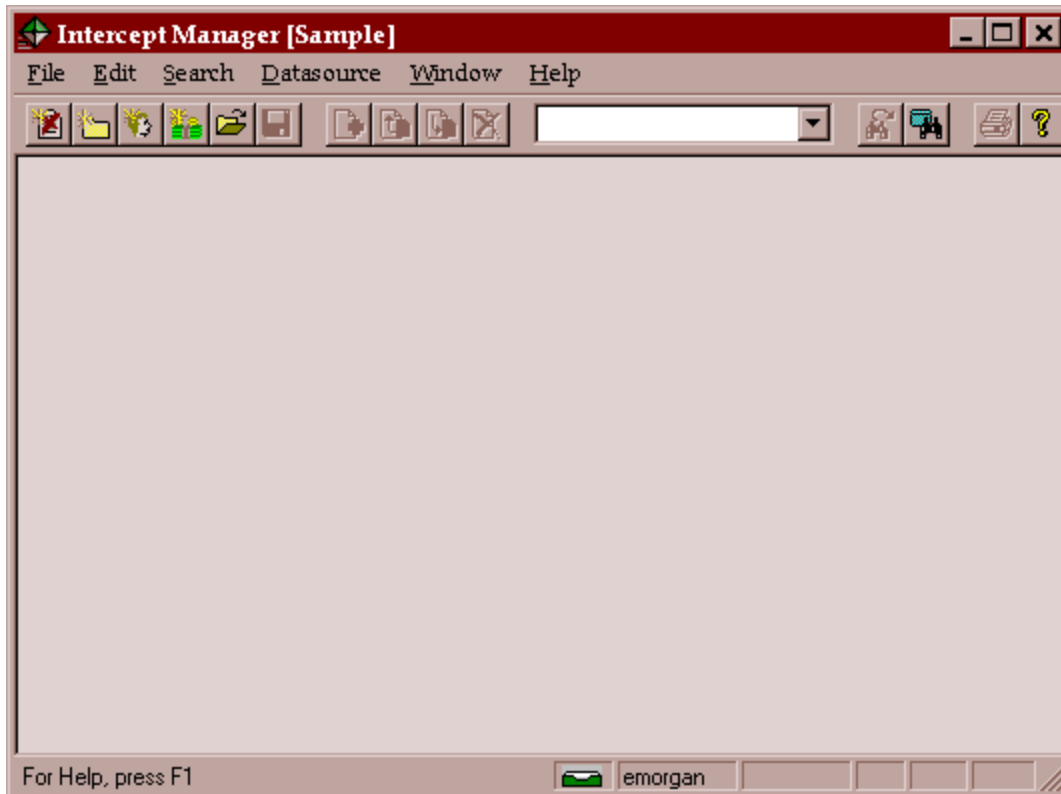
Preferences

You can configure Visual Intercept Manager default settings, <u>system logon parameters</u> , notification options, file location pointers for integration with other products, mail defaults, and data source retrieval filters.

To display or modify your preferences, do the following:

1. Click Edit on the Main menu, and then click Preferences.

2. Click one of the following tabs:

    *   <u>Default Tab</u>

    *   <u>Notification Tab</u>

    *   <u>Integration Tab</u>

    *   <u>Mail Tab</u>

    *   <u>Filters Tab</u>

3. When you are finished setting your preferences, do one of the following:

    *   Click **OK** to save changes.

    *   Click **Cancel** if you do not want to save any modifications you made.

    *   Click **Apply** if you want your changes to take effect but not want to leave the Preferences window.

Default Tab

The Default Tab allows you to set certain defaults in the Visual Intercept Manager.

- Prompts

- Incident Document Defaults

- Project Document Defaults

- System Logon

You can explore the various default options by placing the cursor over an area in the illustration below and clicking.

Prompts

You can choose how you are prompted via the following options.

- Prompt on Delete

- Prompt on Document Close

- Always fetch detail information

Prompt on Delete

Prompts you when you are about to delete a Visual Intercept document from a common data source.

Prompt on Document Close

Prompts you when you close a Visual Intercept document that you have modified.

Always fetch detail information

When this option is checked, Visual Intercept will retrieve all document related information when you fetch information from a common data source. Depending on the number of documents in the data source and the configuration of your system, checking this option could affect the performance of your system.

Incident Document Defaults

see also: Incident Attributes

You can set up Incident document default settings via the **Preferences** option. This is especially helpful when you register Incidents with similar attributes.

Default settings can be defined according to the following attributes:

- Incident Category
- Incident Priority
- Incident Severity
- Incident Status

Project Document Defaults

You can set the default Project document settings for new Project names and versions. This is helpful during those stages when you are creating multiple Projects.

To set up Project defaults, do the following:

- Enter the default name of the Project.

- Enter the default version of the Project.

The name and version will appear each time you create a new Project document.

System Logon

The System logon option allows you to utilize either a ***universal password*** security method or a ***pass-through password*** security method.

> Important: Please read the following discussion prior to any System Logon changes.

It is important to note that there are two (2) general security issues which must be addressed. One issue relates to accessing the Visual Intercept **programs** and the second issue relates to accessing a common **database** that the programs utilize.

There are two general methods to handle these security issues in Visual Intercept, a *universal password* method and a *pass-through password* method. Each method deals with how Visual Intercept interfaces with a database.

> **Check with your administrator to determine which security system is in use.**

Each method of security is illustrated and discussed below.

Universal Password

When you check the System Logon box, the **Visual Intercept application programs** will use the **UserID** and **Password** field information (located below the System Logon Box) to access the database. The *universal password* method is a simple technique which provides a **single** password, for **all** database users, to access the database. Although each Visual Intercept user must have a unique password to access the Visual Intercept programs, the password to access the database is universal. In other words, once into the database, all Visual Intercept users "look" the same.

User — Visual Intercept Manager — Visual Intercept Data Base

User

Unique Visual Intercept user passwords.

Universal Password for all Visual Intercept users.
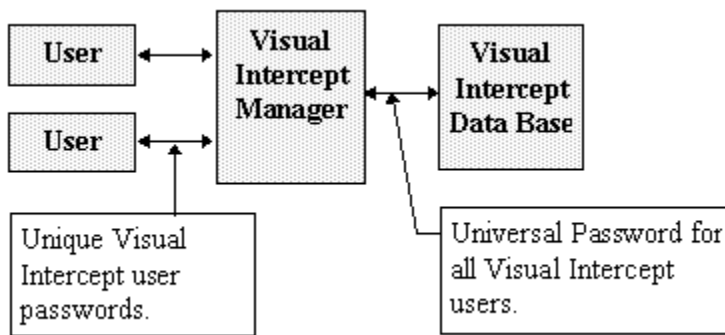
> **Note:** If the System Logon box is checked, Visual Intercept will use the userID and password displayed below the System Logon box to logon to a data source.

Pass-through Password

The *pass-through password* technique is a method that provides each user of Visual Intercept a password that **matches** their unique password to the database. The Visual Intercept application programs then simply "pass through" the user's password to the database. In this case, the System Logon Box is **NOT** checked and Visual Intercept will **NOT** use the userID and password to access the database. It will use the Visual Intercept program password to access the database.
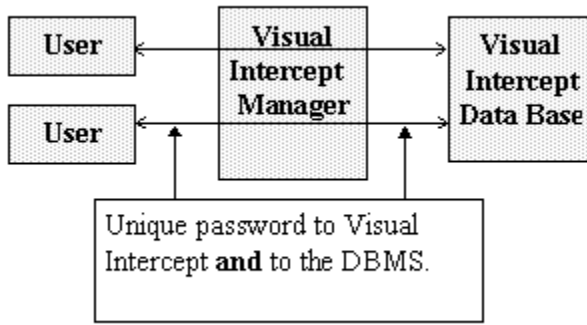
Note: Each user in the database is unique and can be identified. The database administrator will see each user of Visual Intercept as a unique, identifiable, user.

Notification Tab

The notification tab allows you to customize how you receive Visual Intercept document change notifications.

Note: The Notification Server must be running in order to receive Visual Intercept document change notifications. Typically, the system administrator with run the Notification Server.

Options:

Self Notification - selecting this option will enable self notification and you will be notified when you make changes to a Visual Intercept document.

Beep - causes a beep to sound when you have notifications waiting.

Pop-up - displays a pop-up message when you receive new notifications.

Interval:

The interval refers to the number of seconds your system will wait before looking to the Server for notifications. The shorter the time period, the sooner your system will retrieve document change notifications.

Note: Selecting a relatively short interval will prompt your system to poll the data source often. Depending on the number of users and your network configuration, short intervals may affect system performance.

Integration Tab

The Integration Tab allows you to specify where your 3rd party documents are stored, the location of your source code control system, and the location of common report templates.

- [Source Code Control](#)
- [Report Directory](#)
- [Document Manager](#)

Source Code Control

An important feature of Visual Intercept is that you can attach related source code files to Incident documents. You tell Visual Intercept where the source code control system is by setting the directory in the directory field. Entering your source code control system userID and password will allow you to check in and check out source code files from within the Visual Intercept Manager.

- **Directory** - Displays the location of your source code control system.

- **User ID** - Mirrors your source code control system UserID.

- **Password** - Mirrors your source code control system password.

Report Directory

Report templates are stored in a common directory as defined in the Directory field.

Document Manager

The Document Manager is responsible for pointing to the location of 3rd party documents attached to Incidents.

Directory - The common directory where attached 3rd party documents are stored and available for sharing by other Visual Intercept users. This directory should be the same for all Visual Intercept users needing to share attached 3rd party documents.

Temp - When attached documents are launched, they are first copied to this local directory. When an Incident document is updated, the 3rd party documents are copied into the common directory defined above.

Mail Tab

You can send Visual Intercept documents using your network mail system. Setting your mail preferences allows you to automatically logon to your network mail system from Visual Intercept.

UserID - Mirrors your network mail system userID.

Password - Mirrors your mail system password.

Include: - Identifies which information from a Visual Intercept document you want included.

- **Definition** - Include all information contained in a Visual Intercept document.

- **Attachments** - Include any attached documents with the Visual Intercept document being sent.

- **Contacts** - Will send a copy of the mail to a Contact. A Contact's email address is specified in the Communications View of a Contact document.

Filters Tab

You can set Visual Intercept to automatically fetch specific documents from a common data source on initial startup.

- **Directory** - Displays the location of the filters or query scripts.

- **Name** - Indicates the name of the query.

Project Document

A Visual Intercept Project may be an entire software project or a single piece of a larger project. You can easily create and *update* Projects, define relationships among Projects, and establish project hierarchies as needed. As the number and complexity of Projects change, you can revise their respective documents to reflect the changes.

A Project document contains information relating to a single Project. As you enter information regarding a specific Project, Visual Intercept builds the Project document. In other words, for each Project in Visual Intercept, there is a Project document containing important information related to the Project.

A Project may be associated with several other Projects and/or Incidents. However, each Project may have only one related Account. A Project document can have many related Incident documents and/or related Project documents.

Project Document Views:

Views can be displayed by clicking the respective tabs located just above the Header.

- Project Document Header
- Account View
- Description
- Incidents View
- Projects View
- Version

Working with Project Documents:

- Creating
- Inserting
- Updating
- Deleting
- Opening
- Saving

Relating Project Documents

- Relating an Account to a Project
- Relating Projects to Projects

Fetching Project Documents

- Custom Queries
- Redisplaying
- Refreshing

Communication

- [Exporting](#)
- [Importing](#)
- [Sending](#)

Project Document Account View

If an Account is attached to the Project document, this view displays the name, code, and name of the Visual Intercept user Account Representative.

Project Document Header

Displays the name of the Project, Project lead, and the Account code.

Project Version

The Version view displays the versions of the Project. From this view you can add and delete project versions.

Project Description

A verbal description of the Project.

Project Document Projects View

If other Projects are attached to the Project document, this view displays the attached Projects. From the Projects view of a Project document, you can attach, detach, and launch related Projects.

Project Document Incidents View

The Incidents view displays a list of Incidents related to the specific Project. From the Incidents view of a Project document, you can attach, detach, and launch related Incidents.

Relating Visual Intercept Documents

You can create relationships between two or more Visual Intercept documents by [attaching](#) or [detaching](#) the documents.

[Relating 3rd Party Documents to Incidents](#)

[Relating an Account to a Project](#)

[Relating Contacts to Accounts](#)

[Relating Contacts to Incident](#)

[Relating Incidents to Incidents](#)

[Relating Projects to Accounts](#)

[Relating Projects to Projects](#)

[Relating Source Code to an Incident](#)

Actions Menu

The Actions Menu lists additional menus which allow you to relate Visual Intercept documents. The available commands within each sub-menu are dependent on the active Visual Intercept document.

[Account Actions Menu](#)

[Incident Actions Menu](#)

[Project Actions Menu](#)

Account Actions Menu

The following sub-menus are available from the Account Actions menu.

[Contacts](#)

[Projects](#)

Note:
You can attach one or more Contacts to an Account Document.
You can attach one or more Projects to an Account Document.
You can only attach **one** Account to a Project Document.

_____

Relating Contacts to Accounts

You can relate one or more contacts   to an Account document. Relating a Contact to an Account document allows you to maintain the relationship between the Contact and Account.

Attaching a Contact

Detaching a Contact

Launching a Contact

Attaching a Contact to an Account Document

To Attach a Contact to an Account.

1. Open an Account Document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>C</u>ontacts, and then click Attach.

   - From the Contacts tab, click Attach.

3. From the list of Contacts, select a Contact(s) to attach, and then click OK.

4. When you insert or update the Account Document, the Contacts will be attached.

Detaching a Contact from an Account Document

To Detach a Contact from an Account.

1. Open an Account Document.

2. Click the Contacts Tab.

3. Select a Contact.

4. Do one of the following:

    - From the Menu bar, click <u>A</u>ctions, click <u>C</u>ontacts, and then click Detach.

    - From the Contacts tab, click the Detach button.

5. When you insert or update the Account Document, the Contacts will be detached.

Launching a Contact from an Account Document

You can launch a Contact from within an Account document.

1. Open an Account document.

2. Click the Contacts tab, and then select a Contact.

3. Do one of the following:

   - From the Menu bar, click Actions, click Contacts, and then click Launch.

   - Click the Launch button.

   - Double-click the selected Contact.

4. You can then modify the launched Contact. When you insert or update the Account document, the modified Contact will be updated as well.

Relating Projects to Accounts

You can relate one or more Projects to a single Account document. You can relate one, and only one, [Account](#) to a Project document.

Relating Projects to an Account allows you to maintain financial relationship between the Account and the Projects.

[Attaching a Project](#)

[Detaching a Project](#)

[Launching a Project](#)

Attaching a Project to an Account Document

To Attach a Project to an Account.

1. Open an Account document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>P</u>rojects, and then click Attach.

   - From the Contacts tab, click the Attach button.

3. From the list of Projects, select a Project(s) to attach, and then click OK.

4. When you insert or update the Account document, the Projects will be attached.

Detaching a Project from an Account Document

To Detach a Project from an Account.

1. Open an Account Document.

2. Click the Projects Tab.

3. Select a Project.

4. Do one of the following:

    - From Manager Menu, click <u>A</u>ctions, click <u>P</u>rojects, and then click Detach.

    - From the Contacts tab, click the Detach button.

5. When you insert or update the Account document, the Projects will be detached.

Launching a Project from an Account Document

You can launch a Project from within an Account document.

1. Open an Account document.

2. Click the Project tab, and then select a Project.

3. Do one of the following:

    -   From the Menu bar, click Actions, click Projects, and then click Launch.

    -   Click the Launch button.

    -   Double-click the selected Project.

4. You can then modify the launched Project. When you insert or update the Account document, the modified Project will be updated as well.

Project Actions Menu

The following menus are available from the Project Actions menu.

Account

Projects

Versions

Relating an Account to a Project

You can relate one, and only one, Account to a Project document. Relating an Account to a Project document allows you to maintain a financial relationship between the Account and Project.

The following commands are available from the Actions and Accounts menus.

Attaching an Account

Detaching an Account

Launching an Account

Attaching an Account to a Project

To Attach an Account to a Project.

1. Open a Project document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>A</u>ccounts, and then click Attach.

   - From the Accounts View, click the Attach button.

3. From the list of Accounts, select an Account to attach, and then click OK.

4. When you insert or update the Project document, the Account will be attached.

Note: You can only attach one Account to a Project.

Detaching an Account from a Project Document

To Detach an Account from a Project.

1. Open a Project document.

2. Do one of the following:

    - From the Menu bar, click <u>A</u>ctions, click <u>A</u>ccounts, and then click Detach.

    - From the Accounts tab, click the Detach button.

3. When you insert or update the Project document, the Account will be detached.

Launching an Account from a Project Document

You can launch an Account from within a Project document.

1. Open a Project document.
2. Do one of the following:
   - From the Menu bar, click <u>A</u>ctions, click <u>A</u>ccounts, and then click <u>L</u>aunch.
   - Click the Accounts tab, and then click the Launch button.

Relating Projects to Projects

You can relate Projects to Projects.

[Attaching a Project](#)

[Detaching a Project](#)

[Launching a Project](#)

Attaching a Project to a Project

To Attach a Project to a Project Document.

1. Open a Project document.

2. Do one of the following:

    *   From the Menu bar, click <u>A</u>ctions, click <u>P</u>rojects, and then click <u>A</u>ttach.

    *   From the Projects tab, click the Attach button.

3. From the Projects dialog box, select a Project(s) to attach.

4. **Optional**: To relate and/or cross-relate the documents, do the following.

    *   From the Main Relationship drop-down list, select the relationship type of the selected Project to the Main Project document.

    *   If you want to cross-relate the Projects, select the Cross-Relate box, and then select the relationship in the Cross-Relate drop-down list .

        Note: Selecting the Cross-Relate box will provide a cross reference in the attached Project document to the main Project document.

5. When you insert or update the Project document, the Project(s) will be attached.

Note: Any and all cross-related documents will need to be updated.

Detaching a Project from a Project Document

To Detach a Project from a Project Document.

1. Open a Project document.
2. Click the Projects Tab.
3. Select a Project(s).
4. Do one of the following:
   - From the Menu bar, click <u>A</u>ctions, click <u>P</u>rojects, and then click Detach.
   - From the Projects tab, click the Detach button.
5. When you insert or update the Project document, the Project(s) will be detached.

Launching a Project from a Project Document

You can launch a Project from within a Project document.

1. Open a Project document.

2. Click the Project tab, and then select a Project.

3. Do one of the following:

   - From the Menu bar, click Actions, click Accounts, and then click Launch.

   - Click the Launch button.

   - Double-click the selected Project.

4. You can then modify the launched Project. When you insert or update the Project document, the modified Project will be updated as well.

Project Versions

You can create or delete Project versions.

[Creating a New Project Version](#)

[Deleting a Project Version](#)

Creating a New Project Version

You can create a new Project version from the Versions tab of a Project document.

1. Open a Project document.

2. Do one of the following:

    *   From the Menu bar, click <u>A</u>ctions, click <u>V</u>ersions, and then click <u>N</u>ew.

    *   From the Versions tab, click the New button.

3. From the Project Version dialog box, enter the name of the Project Version.

    Optional: If you want all child projects to display the new version, click the Recursive box.

4. Click OK.

Deleting a Project Version

You can delete Project Versions from the Versions tab of a Project document.

1. Open a Project Document.

2. Click the Versions tab, and then select a version or versions.

3. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>V</u>ersions, and then click <u>D</u>elete.

   - From the Versions tab, click the Delete button.

Incident Actions Menu

The following Action Menus are available from the Incident Actions menu.

[Contacts](#)

[Documents](#)

[Incidents](#)

[Source](#)

Relating Contacts to Incident Documents

You can relate one or more contacts to an Incident document. Relating a Contact to an Incident document allows you to maintain the relationship between the Contact and Incident throughout the Incident's life cycle.

Attaching Contacts to Incident Documents

Detaching a Contact from an Incident Document

Launching a Contact from an Incident Document

Attaching Contacts to Incident Documents

To Attach a Contact to an Incident.

1. Open an Incident document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>C</u>ontacts, and then click Attach.

   - Click the Contacts Tab, and then click the Attach button.

3. From the list of contacts, select a Contact(s) to attach, and then click OK.

4. When you insert or update the Incident document, the Contacts will be attached.

Detaching a Contact from an Incident Document

To Detach a Contact from an Incident.

1. Open an Incident document.

2. Click the Contacts Tab.

3. Select a Contact.

4. Do one of the following:

    - From the Menu bar, click <u>A</u>ctions, click <u>C</u>ontacts, and then click Detach.

    - Click the Contacts Tab, and then click the Detach button.

5. When you insert or update the Incident document, the Contacts will be detached.

Launching a Contact from an Incident Document

You can launch a Contact from within an Intercept document.

1. Open an Incident document.

2. Click the Contacts Tab.

3. From the list of Contacts, select a Contact to launch, and then do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>C</u>ontacts, and then click Launch.

   - Click the Launch button.

   - Double-click the selected Contact.

Note: You cannot create a new Contact from within an Incident document. To create a new Contact, see the <u>New Command</u> .

Relating 3rd Party Documents to Incidents

When you attach 3rd party documents to an Incident document, the 3rd party document is inserted to a common directory (as specified in Document Manager Preferences) where other Visual Intercept users can then access the document.

Attaching 3rd Party Documents to an Incident

Detaching 3rd Party Documents from an Incident

Launching 3rd Party Documents from an Incident

Attaching 3rd Party Documents to an Incident

To Attach a 3rd Party Document to an Incident.

1. Open an Incident document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>D</u>ocuments, and then click Attach.

   - Click the Documents Tab, and then click the Attach button.

3. From the Documents dialog box, select the path and name of the document you wish to attach to the Incident document and then click on the Add button. For more details, see Document Attachments

Detaching 3rd Party Documents from an Incident

To Detach a 3rd Party Document from an Incident.

1. Open an Incident document.

2. Click the Documents Tab.

3. Select the 3rd Party Document(s) you wish to detach.

4. Do one of the following:

   • From the Menu bar, click Actions, click <u>D</u>ocuments, and then click Detach.

• Click the Detach button.

5. When you insert or update the Incident document, the 3rd Party Documents will be detached.

Launching 3rd Party Documents from an Incident

To launch a 3rd Party Document from an Incident.

1. Open an Incident document.

2. Click the Documents Tab.

3. Select the 3rd Party Document you wish to launch.

4. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>D</u>ocuments, and then click Launch.

   - Click the Launch button.

   - Double-click the selected Document.

5. You can then modify the 3rd Party Document. When you insert or update the Incident document, the modified 3rd Party Document will be updated as well.

Relating Incidents to Incidents

You can relate Incidents to other Incidents. This may occur when an Incident may be an example of another Incident, provide additional information, may be the same as another Incident, or may be a cause or effect of another Incident.

Attaching Incidents to Incidents

Detaching Incidents from Incidents

Launching an Incident from within an Incident

Attaching Incidents to Incidents

To Attach an Incident to an Incident.

1. Open an Incident document.

2. Do one of the following:

    - From the Menu bar, click <u>A</u>ctions, click <u>I</u>ncidents, and then click Attach.

    - Click the Incidents Tab, and then click the Attach button.

3. From the list of Incidents, select an Incident(s) to attach,

4. **Optional**: To relate and/or cross-relate the documents, do the following.

    - From the Main Relationship drop-down list, select the relationship type of the selected Incident to the Main Incident document.

    - If you want to cross-relate the Incidents, select the Cross-Relate box, and then select the relationship in the Cross-Relate drop-down list .

      Note: Selecting the Cross-Relate box will provide a cross reference in the attached Incident document to the main Incident document.

5. When you insert or update the Incident document, the Incidents will be attached.

Note: Any and all cross-related documents will need to be updated.

Detaching Incidents from Incidents

To Detach an Incident from an Incident.

1. Open an Incident document.

2. Click the Incidents Tab.

3. Select an Incident or Incidents.

4. Do one of the following:

    - From the Menu bar, click <u>A</u>ctions, click <u>I</u>ncidents, and then click Detach.

    - Click the Incidents Tab, and then click the Detach button.

5. When you insert or update the Incident document, the Incidents will be detached.

Launching an Incident from within an Incident

To launch an attached Incident from an Incident.

1. Open an Incident document.

2. Click the Incidents Tab.

3. Select the Incident you wish to launch.

4. Do one of the following:

    *   From the Menu bar, click <u>A</u>ctions, click <u>I</u>ncidents, and then click Launch.

    *   Click the Launch button.

    *   Double-click the selected Incident.

5. You can then modify the launched Incident. When you insert or update the Incident document, the modified Incident will be updated as well.

Relating Source Code to an Incident

You can relate specific source code files to an Incident. When a source code file has been attached to an Incident document, you can check in and check out the source code from your source code control system.

Note: Before you can access your source code control system (SSCS) from within Visual Intercept, you must define your user name, password, and the path to the SSCS. To set these preferences, see the Integration tab in the Preferences   section.

The following commands are accessible from the Actions Menu.

Attaching Source Code

Detaching Source Code

Checking In Source Code

Checking Out Source Code

Details of Source Code

History

Getting Source Code

Attaching Source Code to an Incident

To Attach Source Code Files to an Incident.

1. Open an Incident document.

2. Do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>S</u>ources, and then click Attach.

   - Click the Sources Tab, and then click Attach.

3. Enter the appropriate information in the <u>SCCS Attachments</u> dialog box.

Detaching Source Code from an Incident

To Detach Source Code Files from an Incident.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to detach and then do one of the following:

    - From the Menu bar, click Actions, click Source, and then click Detach.

    - Click the Detach button.

4. When you insert or update the Incident document, the source code files will be detached.

Checking Out Source Code from an Incident

To Check Out Source Code from within an Incident Document.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to check out and then do one of the following:

   - From the Menu bar, click Actions, click Source, and then click Check Out.

   - Click the Check Out button.

4. When you have finished working with the source code file(s), select the checked out source code file(s) and click the Check In button.

Checking In Source Code from an Incident Document

To Check In Source Code from within an Incident Document.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to check in and then do one of the following:

   - From the Menu bar, click Actions, click Source, and then click Check In.

   - Click the Check In button.

Uncheck Out Source Code from an Incident

If you check out source code, modify it, and then decide **NOT** to place the modified code back into the source code control system (SCCS), you can Uncheck out the source code from within Visual Intercept.

To Uncheck Out Source Code from an Incident.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to uncheck out and then do one of the following:

    *   From the Menu bar, click <u>A</u>ctions, click <u>S</u>ource, and then click <u>U</u>ncheck Out.

    *   Click the Uncheck out button.

Details of Source Code from within an Incident

You can get details (*i.e.*, version number, label, etc.) of source code from within an Incident document.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to see details on, and then do one of the following:

    •   From the Menu bar, click <u>A</u>ctions, click <u>S</u>ource, and then click <u>D</u>etails.

    •   Click the Detail button.

History of Source Code from an Incident Document

You can retrieve the history of source code in your source code control system (SCCS) from within an Incident document.

1. Open an Incident document.

2. Click the Sources Tab.

3. Select the source code file(s) you wish to see details on, and then do one of the following:

   - From the Menu bar, click <u>A</u>ctions, click <u>S</u>ource, and then click <u>H</u>istory.

   - Click the History button.

Getting Source Code from an Incident Document

You can **Get** source code from your source code control system (SCCS) from within an Incident document. Getting source code allows you to view the code in a **read-only** state. To modify source code, click Check Out .

SCCS Attachments

The SCCS Attachments dialog box allows you to attach source code to an Incident document. Once a source code file is added, you can view and edit the version and details of the file from within the SCCS Attachments dialog box.

1. Select the source code control system (SCCS) project where the source code is located.

2. Select the source code file(s) you wish to attach to the Incident document. If you want to add all the source code files in the SCCS project, click the Add All button.

3. Click the Add button.

4. **Optional**: If you want to view the version of a source code file, select the file from within the **Sources to Attach:** field and click the Version   button.

5. When you have added all the source code files you wish to attach, click the Close button.

6. When you insert or update the Incident document, the source code files will be attached.

Version

This is where source code version history can be viewed. If you double-click a version, you can view and/or edit the label and provide a description of the version.

Document Attachments

The Document Attachments dialog box allows you to attach 3rd party documents to an Incident document.

1. Select the drive and directory where the 3rd party documents are located. The drive and directories are found in their respective drop-down lists.

2. Select the name of the 3rd party document you wish to attach to the Incident document and then click on the Add button. If you want to attach all the documents in the directory, click the Add All button.

   Note: Documents to be added will appear in the Attached Documents section.

3. When you have Added all the documents you wish to attach, click the Close button.

   Note: If you change your mind and want to remove a 3rd party document, click the Remove button.

4. When you insert or update the Incident document, the 3rd party documents will be copied to the shared directory as specified in the Documents Manager. For more details, see Document Manager .

Retrieving Visual Intercept Documents

[Custom Queries](#)

[How to Fetch all Visual Intercept Documents](#)

[How to Open a Visual Intercept Document](#)

[How to Redisplay](#)

[How to Refresh a Visual Intercept Document](#)

How to Fetch all Visual Intercept Documents

To fetch all Visual Intercept documents of a specific type.

Click one of the following from the Browser toolbar.

- - [Fetch all incidents](#)
- -.[Fetch all projects](#)
- -.[Fetch all contacts](#)
- - [Fetch all accounts](#)

Custom Queries

Custom queries allow you to selectively fetch Visual Intercept documents from a common data source.

Execute Query

Visual Intercept Query Builder

![Visual Intercept logo]

Visual Intercept Query Builder

The Query Builder allows you to retrieve Incident management information according to your specifications. Using Structured Query Language (SQL), you can build custom queries to retrieve only the information you want. The Visual Intercept Query Builder helps you build a custom query or "where clause." A "where clause" is a database request for certain records that meet specific criteria. For example, you might want to fetch only those Incidents that were requested by you and are still under investigation. Or, you might want to fetch specific Contacts, Accounts, or Projects. The Query Builder can help you build a "where clause" to do this!

1. To Build a Custom Query, do one of the following:

   - From the Main menu, click <u>S</u>earch, and then click <u>B</u>uild Query.

   - From the Browser toolbar, click the Build Query shortcut button ![icon].

2. From the Query Builder dialog box, enter the following information:

   - **Result Type:** From the drop-down list, select the type of Visual Intercept document you want to retrieve from the data source.

   - **Title:** Enter a title for this query or if you want to modify a specific query, select the query name from the drop-down list.

   - **Optional**: If you want to create a new query, based on a previously saved query, click the Open button and select a specific file name. When finished, click the Save button to save the new query. The new title will appear in the Query drop-down lists displayed in the Menu bar and Browser toolbar.

   - **Available Columns:** Select each column you want retrieved from the data source. After each selection, click the **Add** button.

   - **Selected Columns:** Columns displayed here will be available to set conditions on when you create your query. If you decide not to set conditions on a column, select the column and click the Remove button. Before setting operands, values, and AND/OR conditions, you **must first** have the appropriate column selected from this list.

   - **Conditions**:
     - If you select more than one column to restrict, Visual Intercept automatically tags the columns on as additional **AND** clauses. If you wish to change the **AND** operator to an **OR** operator, select the column name in the Selected Columns list and then click the OR button in the Conditions area.

       Note: The "Where Clause" is displayed in the bottom portion of the Query Builder dialog box.

     - **Operand**: Select an appropriate <u>operand</u>   for each column in your, "Where Clause," by first selecting the column from the Selected Columns list and then choosing the appropriate operand from the list.

     - **Value**: Enter a value to compare with each column variable in your, "Where Clause." If the column has pre-defined values, you can select a specific value by clicking the ![button icon] button and selecting the appropriate value.

   - **Where Clause:** This is where your, "Where Clause" is displayed. You can modify the "Where Clause" directly.

3. Do one, or more, of the following:
   - To save the query, click Save and name the query file.
   - To execute the query immediately, click OK.   See also: Execute Query
   - To cancel, click Cancel.

Execute Query

The Execute Query command allows you to execute queries of the data source.

To execute queries, do one of the following:

- From the Main menu, click Search, click Execute Query, and then click the name of the query from the query list.

- From the Browser, select a query from the Query window drop-down list, and then click the Execute Query shortcut button .

See also: Visual Intercept Query Builder

Query Builder

The Query Builder allows you to retrieve Incident management information according to your specifications. Using Structured Query Language (SQL), you can build custom queries to retrieve only the information you want. The Visual Intercept Query Builder helps you build a custom query or "where clause." A "where clause" is a database request for certain records that meet specific criteria. For example, you might want to fetch only those Incidents that were requested by you and are still under investigation. Or, you might want to fetch specific Contacts, Accounts, or Projects. The Query Builder can help you build a where clause to do this!

1. To build a custom, "where clause," enter the following information:

   - **Result Type:** From the drop-down list, select the type of Visual Intercept document you want to retrieve from the data source.

   - **Title:** Enter a title for this query or if you want to modify a specific query, select the query name from the drop-down list.

   - **Optional**: If you want to create a new query, based on a previously saved query, click the Open button and select a specific file name. When finished, click the Save button to save the new query. The new title will appear in the Query drop-down lists displayed in the Menu bar and Browser toolbar.

   - **Available Columns:** Select each column you want retrieved from the data source. After each selection, click the **Add** button.

   - **Selected Columns:** Columns displayed here will be available to set conditions on when you create your query. If you decide not to set conditions on a column, select the column and click the Remove button. Before setting operands, values, and AND/OR conditions, you **must first** have the appropriate column selected from this list.

   - **Conditions**:

     - If you select more than one column to restrict, Visual Intercept automatically tags the columns on as additional **AND** clauses. If you wish to change the **AND** operator to an **OR** operator, select the column name in the Selected Columns list and then click the OR button in the Conditions area.

       Note: The "Where Clause" is displayed in the bottom portion of the Query Builder dialog box.

     - **Operand**: Select an appropriate operand   for each column in your, "Where Clause," by first selecting the column from the Selected Columns list and then choosing the appropriate operand from the list.

     - **Value**: Enter a value to compare with each column variable in your, "Where Clause." If the column has pre-defined values, you can select a specific value by clicking the [...] button and selecting the appropriate value.

   - **Where Clause:** This is where your, "Where Clause" is displayed. You can modify the "Where Clause" directly.

2. Do one, or more, of the following:

   - To save the query, click Save and name the query file.

   - To execute the query immediately, click OK.   See also: Execute Query

- To cancel, click Cancel.

How to Redisplay

An important feature of Visual Intercept is the ability to **redisplay** documents that have been previously retrieved from the data source. Once you have fetched a Visual Intercept document, the document is maintained locally. Even if you close the document's window, you can quickly retrieve the document later in your Visual Intercept session by redisplaying the document.

This powerful feature allows you to easily work with several Visual Intercept documents simultaneously. You do not have to re-*fetch* each document from the data source each time you switch from one document to another.

Note: Each time a user *fetches* a Visual Intercept document, the data source is accessed. The performance of your system can be affected as the number of users, and subsequent data source document retrievals, increase. The ability to Redisplay a previously *fetched* document allows Visual Intercept to minimize data source traffic, which increases your performance!   You can easily, and quickly, work on documents retrieved from the data source earlier in your Visual Intercept session by redisplaying them.

To Redisplay a Visual Intercept document, do one of the following:

- From the project tree in the Browser, double click on a Visual Intercept document icon.
- From the Visual Intercept Manager Main Menu, click <u>W</u>indow.
  1. Click one of the following Visual Intercept windows:
     - <u>Browser</u>   - to toggle the Browser on or off.
     - <u>Accounts</u>   - to redisplay previously fetched Account Documents.
     - <u>Incidents</u>   - to redisplay previously fetched Incident Documents.
     - <u>Contacts</u>   - to redisplay previously fetched Contact Documents.
     - <u>Projects</u>   - to redisplay previously fetched Project Documents.
     - <u>Notifications</u>   - to redisplay the notification list.
  2. To work with a Visual Intercept document, double-click a document from the displayed list. If viewing the Browser, double-click on an icon in the project tree.

Accounts Window

This will [re-display](#) any Accounts previously [fetched](#) from the data source.

Browser Window

This will re-display the Visual Intercept Browser if Visual Intercept documents have been previously fetched from the data source.

Contacts Window

This will [re-display](#) any Contacts previously [fetched](#) from the data source.

Incidents Window

This will [re-display](#) any Incidents previously [fetched](#) from the data source.

Notification Window

This will display the Notification window. Visual Intercept notifications are displayed in this window.

Projects Window

This will [re-display](#) any Projects previously [fetched](#) from the data source.

Incident List

This window displays a list of the all Incidents fetched from the data source during the current Visual Intercept session.

Project List

This window displays a list of the all Projects fetched from the data source during the current Visual Intercept session.

Account List

This window displays a list of the all Accounts fetched from the data source during the current Visual Intercept session.

Contact List

This window displays a list of the all Contacts fetched from the data source during the current Visual Intercept session.

Notification List

This window displays a list of all Notifications not yet read.

Query List

This window displays the result set of a query.

Storing Visual Intercept Documents

You can store Visual Intercept documents locally or share them with other Visual Intercept users by inserting new documents or updating modified documents.

[Creating a New Visual Intercept Document](#)

[Inserting a Visual Intercept Document](#)

[Saving a Visual Intercept Document](#)

[Updating a Visual Intercept Document](#)

New Incident Command

This button allows you to quickly create a new Incident document.

New Project Command

This button allows you to quickly create a new Project document.

New Account Command

This button allows you to quickly create a new Account document.

New Contact Command

This button allows you to quickly create a new Contact document.

Incident Status

The Status of an Incident provides information regarding an Incident's placement in its life cycle.

Incident Priority

The priority of an incident Indicates how quickly an Incident needs to be resolved.

Incident Severity

Severity indicates the effects of an Incident.

Incident Category

The category indicates how the Incident was found or the kind of Incident.

Requested User

The requested Visual Intercept user is one who requests some type of Incident action.

Assigned User

The assigned Visual Intercept user is one who has responsibility for handling an Incident.

Modified

The modified field displays the name of the last Visual Intercept user to make any changes to an Incident document. This is a **read-only** field.

Defining a Visual Intercept Document

You define an Intercept document by entering information about the document. Information within a Visual Intercept document is displayed in unique views.

Account Representative

The Account Representative is the Intercept user responsible for an Account. The Account Representative is notified of any changes to an Account document.

Incident Document Project Field

All Incidents must be associated with a specific Project. You can select a Project from the drop-down list.

Incident Document Project Version

Visual Intercept allows you to identify specific versions of a Project associated with an Incident. Simply select a version from the drop-down list. Valid Project versions are defined in the corresponding Project document.

Incident Document Subject Field

The Subject field provides a brief description of the Incident. This is required information and also provides the Incident label displayed in the Browser project tree.

Incident Document Incident Field

The Incident field displays the Incident number assigned to the Incident. New Incidents are defined as **<Unknown>** until they are *inserted* into the data source. Intercept assigns sequential numbers to Incidents as they are *inserted* into the data source. You can also assign your own Incident numbers, or codes, to an Incident by editing the Incident field.

Operands

Operands compare your query values with the column values in a database.

Operands used in SQL include:

>=   A value is greater than or equal to a column value.

<=   A value is less than or equal to a column value.

<>   A value is not equal to a column value.

=   A value is equal to a column value.

>   A value is greater than a column value.

<   A value is less than a column value.

IN   A value is in a set.

BETWEEN   A value is between two values.

LIKE   A value is similar to a (*i.e.,* wild card characters).

NOT IN   A value is not in a set.

NOT BETWEEN A value is not between two values.

NOT LIKE   A value is not similar to a value.

How to use the Visual Intercept Manager

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ODBC and Data Sources

Visual Intercept uses the open database connectivity (ODBC) application program interface (API) specification to link to database management systems. In other words, Visual Intercept is not database management system (DBMS) specific. You can use Visual Intercept with a DBMS you may already own.

Currently, Visual Intercept supports Microsoft® SQL Server and Oracle® and is shipped with a Microsoft Access database. The installation procedure will place a copy of an MS Access database onto your hard drive and allow you to work with Visual Intercept immediately. If you are going to use a database other than the MS Access database supplied, you will need to install the appropriate ODBC drivers for your database management system.

Data Source Selection

Installation of the ODBC drivers on your system provides the appropriate mechanisms necessary for Visual Intercept to communicate with the database management system of your choice. In order to utilize the DBMS, Visual Intercept must know the exact name and physical location of the Visual Intercept database, within the database management system. When you identify the specific name and location of a database, you [define a data source.](#)

To establish a different data source connection with Visual Intercept

Visual Intercept is also shipped with the appropriate ODBC drivers to utilize SQL Server. The following describes how to define a data source using database ODBC drivers other than the automatic MS Access data source connection.

The following procedure describes how to connect to a common data source using Microsoft's ODBC drivers.

1. To launch Visual Intercept and define a New data source, do one the following:

   - Double click the Visual Intercept Manager icon from the Visual Intercept program group.

   - From Windows 95 - click the Windows 95 Start button, point to Programs, point to Visual Intercept, and then click the Visual Intercept Manager.

2. Click *New* from the Visual Intercept Security dialog box.
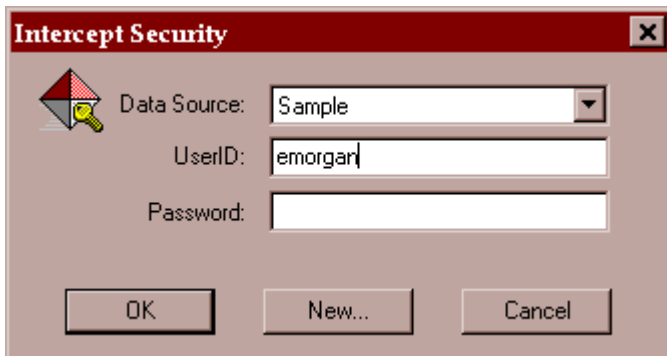
   Note: Clicking the New button will launch the ODBC Administrator.

3. Select the appropriate ODBC driver from the Installed ODBC Drivers list in the Add Data Source dialog box and then click OK.

4. From the dialog box, enter the name you want to give for the data source. This can be any name you choose.

   Note: We suggest using the same name for common data sources at each computer. This will help prevent confusion when accessing a common data source from a different computer.

5. If desired, you can enter a brief description to help you identify the characteristics of the data source you are naming.

6. From the Server drop-down list, select the server address. This defines the physical location of the database.

   Note: If the Server address is not listed, contact your administrator for the address.

7. Click the Options button to display the Database Name field.

8. Enter the specific name of the Visual Intercept database, and then click OK. The specific name of the database is determined by your System Administrator.

9. From the Visual Intercept Security dialog box, select the name of the data source just

created from the Data Source drop-down list.

10. Enter your name and password in the appropriate boxes, and then click OK.

Note: See your System Administrator if you do not have a user name or password.

You are now ready to use the Visual Intercept Incident Management System!

ODBC Driver Installation

The following procedure is used to install Microsoft® ODBC drivers.

1. Click the ODBC button.

2. Insert the ODBC disk when prompted and then click OK.

3. From the Microsoft ODBC Setup dialog box, click Continue to install the ODBC drivers.

4. From the Available ODBC Drivers list, select the ODBC drivers you want to install, and then click OK.

The following diagram depicts an example of the state of your system after the Visual Intercept programs and Oracle and SQL Server database ODBC drivers have been installed.
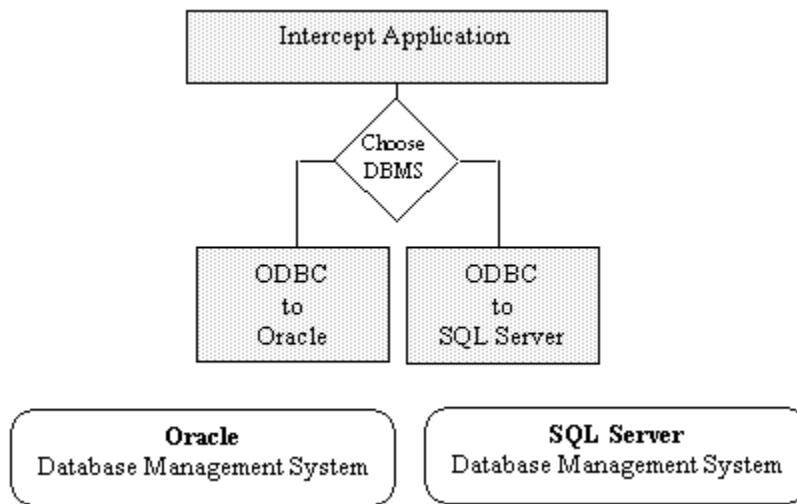
Note that after installation, the mechanisms are in place to define a common data source. However, the database schema   has not yet been created and the data source has not yet been defined.

You need to define a data source so that the Visual Intercept application programs know specifically which database to use and its physical location. You can define multiple data sources to use with Visual Intercept. When you launch Visual Intercept, you will be asked which data source you would like to use.

The following diagram depicts an example of the state of your system after selecting a SQL Server data source .
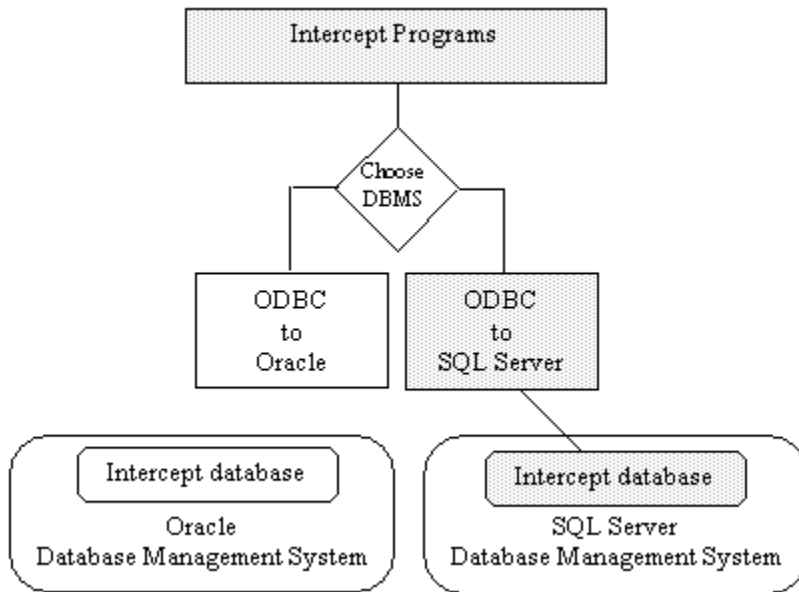
Note the links between the SQL Server database and Visual Intercept. The physical location of the database management system and the Visual Intercept database is the data source. After you define a data source, Visual Intercept is ready to use.
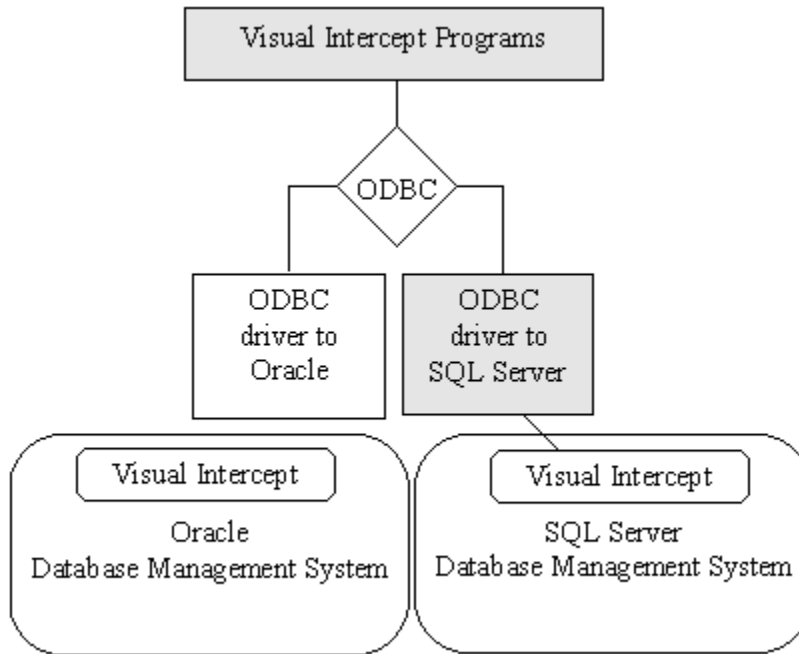
Defining a Data Source

You need to define a data source so that the Visual Intercept application programs know specifically which database to use and its physical location. You can define multiple data sources to use with Visual Intercept. When you launch Visual Intercept, you will be asked which data source you would like to use.

Data Source Objectives

The following diagram depicts an example of the state of your system after defining, naming, and selecting a SQL Server data source.

Note the links between the SQL Server database and Visual Intercept. The physical location of the database management system and the Visual Intercept database is the data source. After you define a data source, Visual Intercept is ready to use.