DELPHION

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Updated: Mar 30, 2005

Tracking Help for Group/Corporate Account Administrators

This Tracking Help page is for Group/Corporate Account Administrators. This page covers account administration features and functions with the exception of reporting.

For Account Administrator Help on Reporting, please see: Tracking Report Help for Group/Corporate Account Administrators.

For a discussion of things Group/Corporate Account Administrators will want to consider before configuring Tracking for the first time see: Account Administrator Considerations for Configuring Tracking Functionality.

If you are an end user who is part of a group/corporate account, please see: Tracking Help for Group/Corporate Account End Users.

If you are an individual Unlimited or Premier credit card subscriber or an individual using a free Basic registration, please see: Tracking Help for Individual Users.

What to use Tracking for:
Use Tracking to support chargebacks in legal and consulting firms and to allocate inter-departmental costs in a corporate environment.

Tracking can give you a detailed listing of session activity, including:

- Time
- Downloads, Alerts, other transaction items
- Searches
- Record views
- Feature use (Snapshot, Clustering, Corporate Tree, etc.)

Tracking *trail* details can be used as search histories and you can rerun searches from a trail, link to viewed records or access downloaded PDFs. Tracking gives you flexible and comprehensive reporting options as well as the ability to attribute costs to specific activities.

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How does Tracking differ from Time Tracking?
Tracking incorporates the original Time Tracking functionality - as well as the original Client Reference, and Mandatory Client Reference functionalities. Tracking is the umbrella under which all of these functionalities now exist.

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Account Administrator privileges:
Account Administrator IDs are exempt from Mandatory Tracking so they can perform account administration without charging time against a client.

If you are an Account Administrator who also does research, and tracking is mandatory at your company, you need to:

- Remember to start tracking when you use Delphion for research -OR-
- Use a regular user ID for your research

 Note: If you want to track the time you spend on account administration, establish an administrative Client Reference to track your administrative time against.

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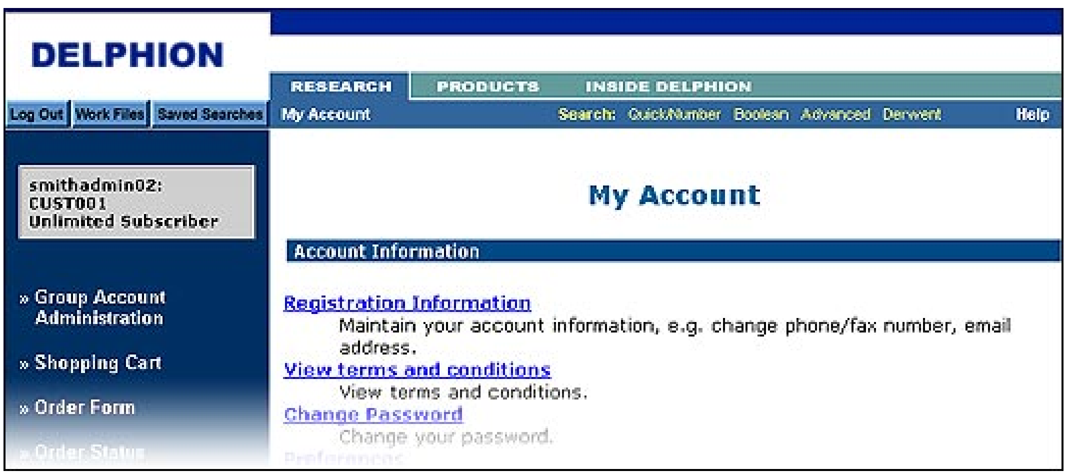
Accessing Tracking Administration:

1. When logged in as a contract/group Account Administrator, click the **My Account** link on the secondary navigation bar (under the Research tab) at the top of your screen. The My Accounts page displays.

    Note: The **Tracking** link on the left on the My Account page is for users to access personal tracking functions and reports. If you use Delphion as a user (in addition to your Account Administrator activities) use this link to manage your individual tracking. To administer Tracking for your whole account, begin with the Group Account Administration link as described following.

2. Once on the My Accounts page, click the **Group Account Administration** link in the navigation on the left side of the page. The Contract (Group) Administration page displays.



    Note: Before the release of these enhanced Tracking features, the **Group Account Administration** page could only be accessed through a URL provided by the Delphion Support Team. With the enhanced Tracking release, your Account Administrator ID will now cause the Group Account Administration link to display in the navigation on the left side of the page. The direct URL is still valid if you prefer to continue using it.

3. On the Contract (Group) Administration page, choose **Tracking Administration** from the options presented in the center of the page. The Tracking Administration page displays.

    Note: Links to the Contract (Group) Account Administration screen and the Tracking Administration screen only display when you are logged in as an Account Administrator.

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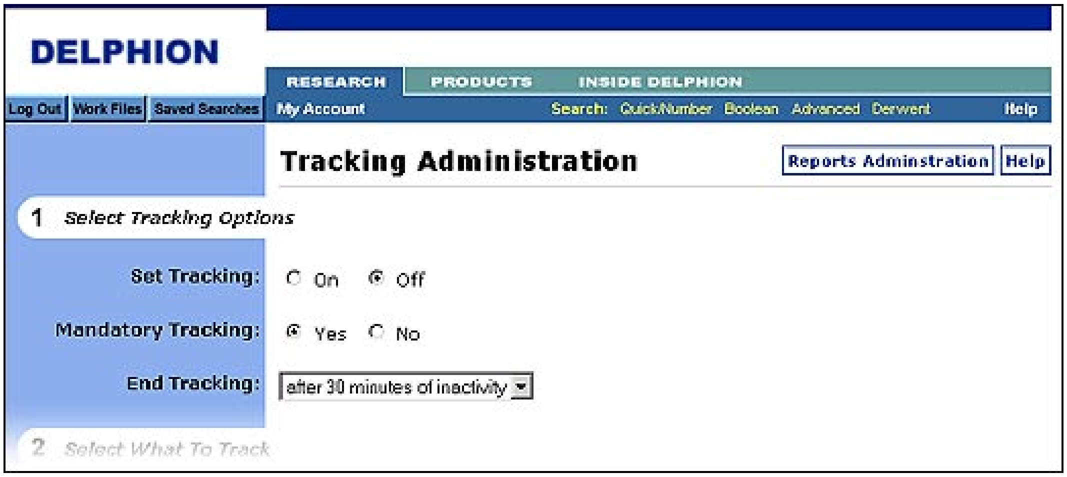
Functions/fields on the Tracking Administration page:

1. ***Select Tracking Options:***
   Use the Select Tracking Options fields to set Tracking options for your entire account.



Set Tracking
Turn Tracking **On** to allow your users to track their Delphion activities. Turning Tracking On does *not* make tracking mandatory (see Mandatory Tracking following).

Turn Tracking **Off** to prevent users in your account from using tracking as part of your overall account. The default is On.

> **Note:** Tracking can be turned On and Off without impacting other settings on the account. You can have Tracking Off but still have Mandatory Tracking On — in this case, as soon as you turn Tracking On, Mandatory Tracking will go into effect.

Mandatory Tracking
Turn Mandatory Tracking **On** to require all users on your account to provide a Client Reference upon login and use Tracking at all times.

Turn Mandatory Tracking **Off** to allow users to track or not track at will. The default is Off.

> **Considerations:** If it is a business requirement that all work done on Delphion be charged back to a client, you should consider enabling Mandatory Tracking.
>
> If users in your organization sometimes do work that is not billable, then perhaps it would be best to leave tracking as optional. In this case it would be at the individual user's discretion as to whether or not to initiate a trail. Alternatively, if you would like to require users to make a decision upon login, you could choose to enable Mandatory Tracking, and provide an internal Client Reference to track non-billable work. This option would provide consistency and ensure that your organization captures all necessary information for cost recovery.
>
> **Note:** Account Administrator IDs are exempt from Mandatory Tracking. See Account Administrator privileges for more information.

End Tracking
Indicate the length of time an inactive Tracking session should be kept open before being automatically stopped. Options range from **after 6 minutes of inactivity** to **when session ends**. *Session* refers to the user's browser session. The default is **after 30 minutes of inactivity**.

> **Considerations:** Inactivity is a dormant period when there is no navigation, searching, or use of productivity or analysis tools on Delphion. The End Tracking options available were designed to accommodate the billing practices most commonly used (e.g. 15-, 10- and 6-minute increments).
>
> **Note:** If a user closes a browser session without logging out or first stopping the current trail, the next time the user logs in the system will add the specified inactivity time (e.g., 30 minutes) to the point at which activity was last recorded. For best accuracy on reporting, it is advisable to instruct users to always log out or stop tracking before closing their browsers.

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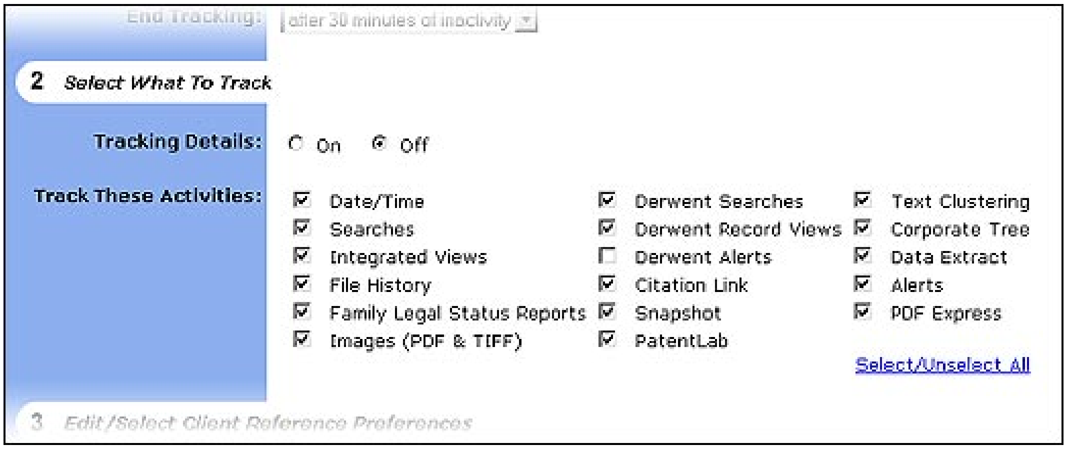
2. ***Select What To Track***

You can configure your company's account to track time and various activities routinely performed on Delphion, including: total time, searches, Integrated Views, File History, Family Legal Status Reports, images (PDF & TIFF), Derwent searches, Derwent record views, Derwent Alerts, Citation Link, Snapshot, PatentLab, Clustering, Corporate Tree, Data Extract, Alerts, and PDF Express.



Tracking Details

Turn Tracking Details **On** to record *details* of a user's actions, creating a trail that can be replicated. Examples of details are the search string executed, the publication number of the record viewed, or a link to the PDF that was downloaded. The specific activities for which details should be tracked are selected in the **Track These Activities** section following.

Turn Tracking Details **Off** to only record a user's general actions, based upon which activities are selected for tracking below. When Tracking Details is turned Off, only the type of activity is recorded (e.g., Searches, Image, Integrated Views). The default is Off.

Track These Activities

Check boxes to indicate the user activities for which you want details recorded when Tracking Details is turned On. The following activities are On (tracked) as the default: File Histories, Family Legal Status Reports, Images (PDF & TIFF), Derwent Searches, Derwent Record Views, Derwent Alerts, PatentLab, Data Extract, Alerts and PDF Express.

> **Considerations:** One of your options is to track *time*. In determining whether to track time, you should consider whether your organization wants to charge back clients based on time spent on the site. If you choose, you will be able to assign a cost per hour to that time to make chargebacks even easier (see Select Billing Costs for further information).
>
> You may also wish to track billable activities (e.g. document downloads, Data Extract and Snapshot) to enable proper charge back for transactional charges incurred on your Delphion account.
>
> You also have the option to track details, which can be useful in constructing and describing a particular *trail*. A trail is a list of all of the activities tracked against a single Client Reference during a session. Detail information will let you reconstruct search histories and provide an auditable trail for billing or client reporting purposes.
>
> You should also consider your organization's confidentiality and privacy policies. Companies with the most stringent policies may choose only to track time and cost. Others may be comfortable enabling tracking of the full details. Delphion employs a robust security infrastructure to prevent others from discovering the details of your work if you choose to track full details. See additional information on Security, Privacy & Reliability.

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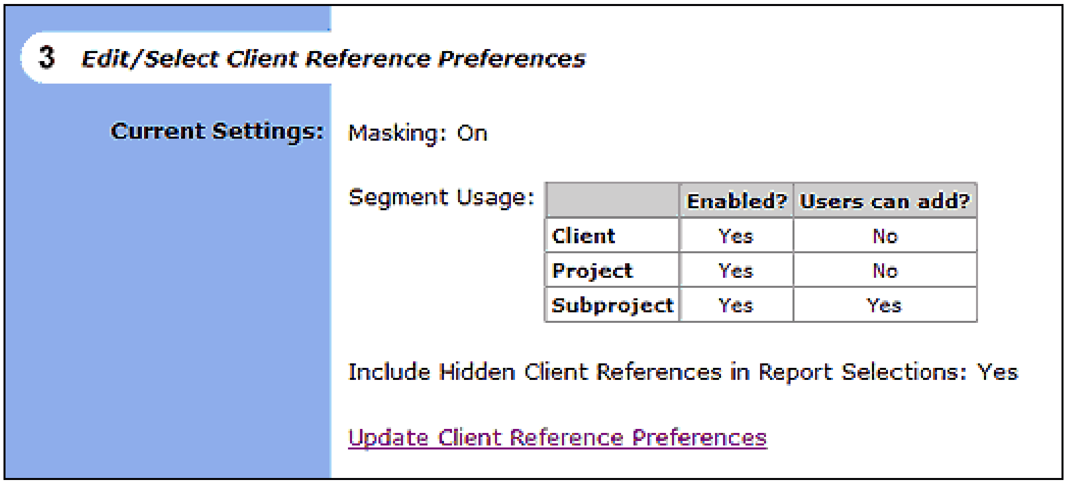
3. ***Edit/Select Client Reference Preferences***

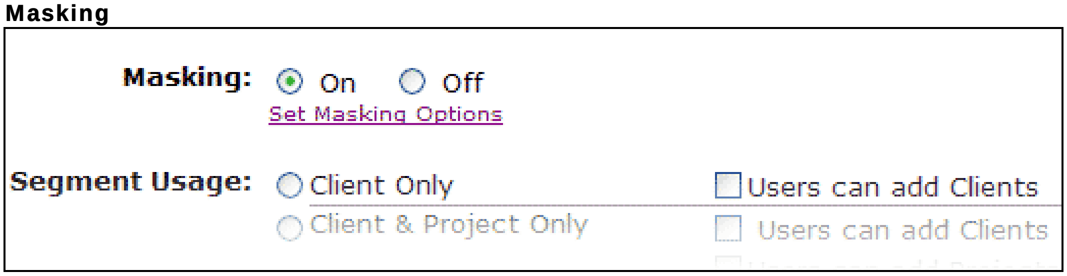
Client References can be configured to use from one to three tiers of hierarchy (Client, Project, Subproject). At a minimum you must use the Client level of hierarchy to allocate time and activities. If your organization is working on multiple projects for the same client, then you may want to allocate usage to the individual Projects that you are working on for that same client. If more detailed information is required, you also have the option to allocate usage on a Subproject (or task) basis for individual projects. Client Reference segmentation also applies to those who want to allocate costs to specific business units, departments and even individual employees.

The **Edit/Select Client Reference Preferences** section on the **Tracking Administration** page shows you how your account is *currently* configured for Masking, Segment Usage and Hide/Show Client References in Reports.



To update this configuration, click the **Update Client Reference Preferences** link. The Edit/ Select Client Reference Preferences then displays.

Masking



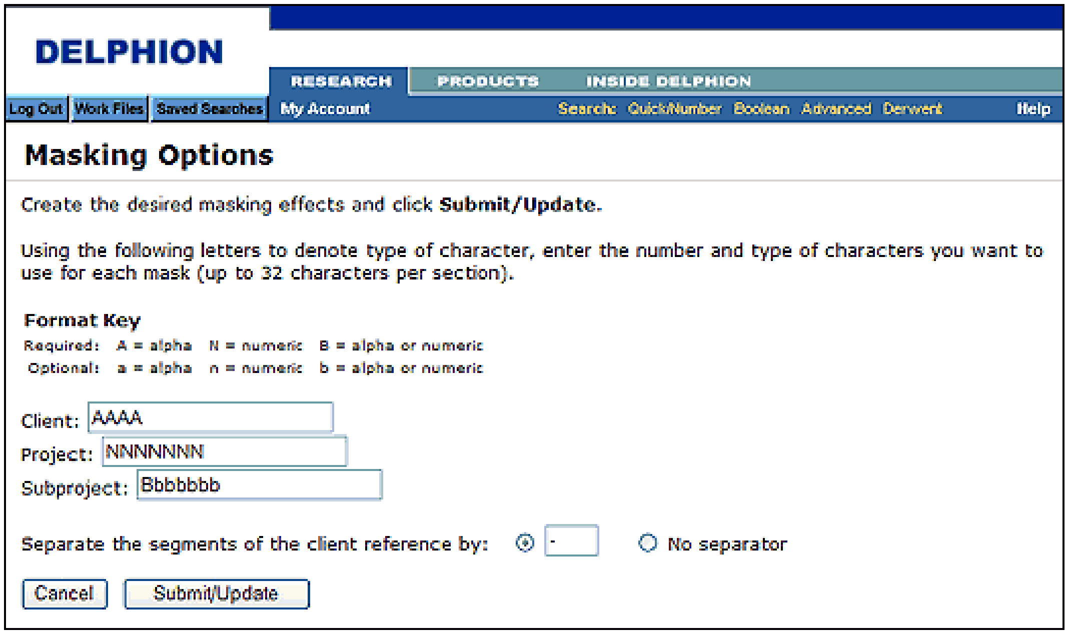
Turn Masking **On** to require use of a predefined standard for Client References. When first turning Masking On, use the **Set Masking Options** link to go to the Masking Options page and create the Client Reference Masks/standards.

Turn Masking **Off** to allow your users to create Client Reference information without predefined standards. The default is Off.

> **Considerations:** If the formatting of Client Reference information is important for compliance with your company's accounting charge code standards, then you should consider turning Masking On and requiring users to follow a predefined standard. Once you have defined the standard (the mask), only the type and number of characters you specify will be allowed for each field.

Masking Options

Use the Masking Options screen to define the standards for Client References. Each section of the Client Reference can have up to 32 characters.



For Client, Project and Subproject text boxes, enter the identifier for the type of character(s) you want used — enter multiple identifiers to indicate multiple characters.

Choose from the following identifiers:

A = required alpha character a = optional alpha character
N = required numeric character n = optional numeric character
B = required alpha or numeric character b = optional alpha or numeric character

Note: Client References are *not* case sensitive.

Example:
Three-segment Client Reference: SMIATL2001-2004003-DIS

Client Mask: AAAaaaNNNN
Project Mask: NNNNnnn
Subproject Mask: AAA

SMIATL2001-2004003-DIS "decoded:"

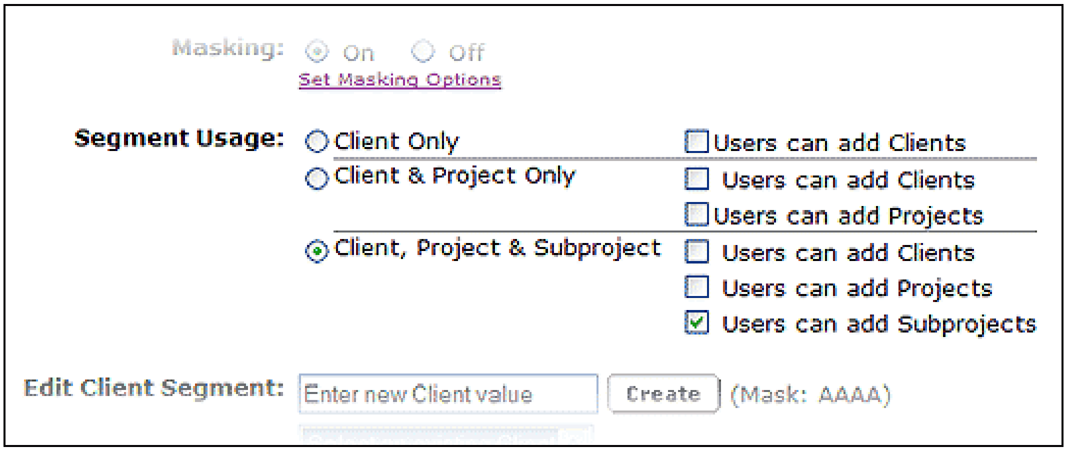
Client	AAA	First 3 letters of client's name (required)	Smickel Manufacturing,	SMI
	aaa	First 3 letters of the client's city if the client has multiple locations (optional)	Atlanta office	ATL
	NNNN	Year the client contract was initiated (required)	2001	2001
-	-	Separator	-	-
Project	NNNN	The year this project was begun	2004	2004
	nnn	Project sequence number if more than one project (optional)	3rd project of the year	003
-	-	Separator	-	-
Subproject	AAA	First 3 letters of project phase (required)	Discovery	DIS

Considerations: Formatting of Client Reference information may be integral to data uniformity and compliance with your company's accounting charge code standards. Use of masking enforces these standards by requiring users to enter Client Reference segment information in the prescribed format.

Segment Usage
Use the Segment Usage fields to define the number of segments to be used for Client

References for your account and to assign user privileges for adding those segments (Clients, Projects and Subprojects). Client Reference assignment privileges apply to all users.

> **Note:** These Segment Usage fields only address the number of Client Reference sections used for the account and users' ability to add Clients, Projects and Subprojects. The format/standard for the creation of Client References, and whether or not that standard is required, is a function of Masking (see preceding Masking section for details).



Client Only
Select Client Only to use only one level — the Client level — of Client References for your account.

Check **Users can add Clients** to give your users the ability to add Clients themselves. If you do not give users the ability to add Clients, Account Administrators will need to add all Clients to the system.

Client & Project Only
Select **Client & Project Only** to require two levels — the Client level and the Project level — of Client References for your account.

Check **Users can add Clients** to give your users the ability to add Clients themselves. Check **Users can add Projects** to give your users the ability to add Projects themselves. You can give users the ability to add Projects themselves, but not give them the ability to add Clients — or the reverse. Any privileges not given to the users are the responsibility of the Account Administrator.

Client, Project & Subproject Only
Select **Client, Project & Subproject Only** to require all three levels — Client, Project and Subproject — of Client References for your account.

Check **Users can add Clients** to give your users the ability to add Clients. Check **Users can add Projects** to give your users the ability to add Projects. Check **Users can add Subprojects** to give your users the ability to add Subprojects. You can give users the ability to add Subprojects themselves, but not give them the ability to add Projects or Clients. Privileges not given to the users remain the responsibility of the Account Administrator.

> **Considerations:** The most common practice is to assign user privileges in a hierarchical fashion: if a user can assign Clients (the highest level) then it would be permissible for them to also assign Projects and Subprojects (if they are used). The feature however is fully flexible and the privileges to add Clients, Projects and Subprojects all work independently.
>
> The decision to either centralize or de-centralize the creation of Client References can be critical to the successful implementation and capturing of accurate chargeback information. Centralized control allows the Administrator to pre-define Client Reference information and provide the user with a distinct set of choices from which to choose when using the Tracking functionality. This may be needed to comply with your organization's accounting charge code standards. This approach ensures data uniformity, increased data accuracy, and ease of reporting without extensive data cleanup; however it places the burden of system maintenance on the Administrator.
>
> A fully distributed approach to the input of this information does lessen the administrative effort, but can result in a high degree of data variability. In the distributed approach users are able to add new Clients, Projects or Subprojects;

however there is the possibility of redundancy that may require subsequent data cleanup.

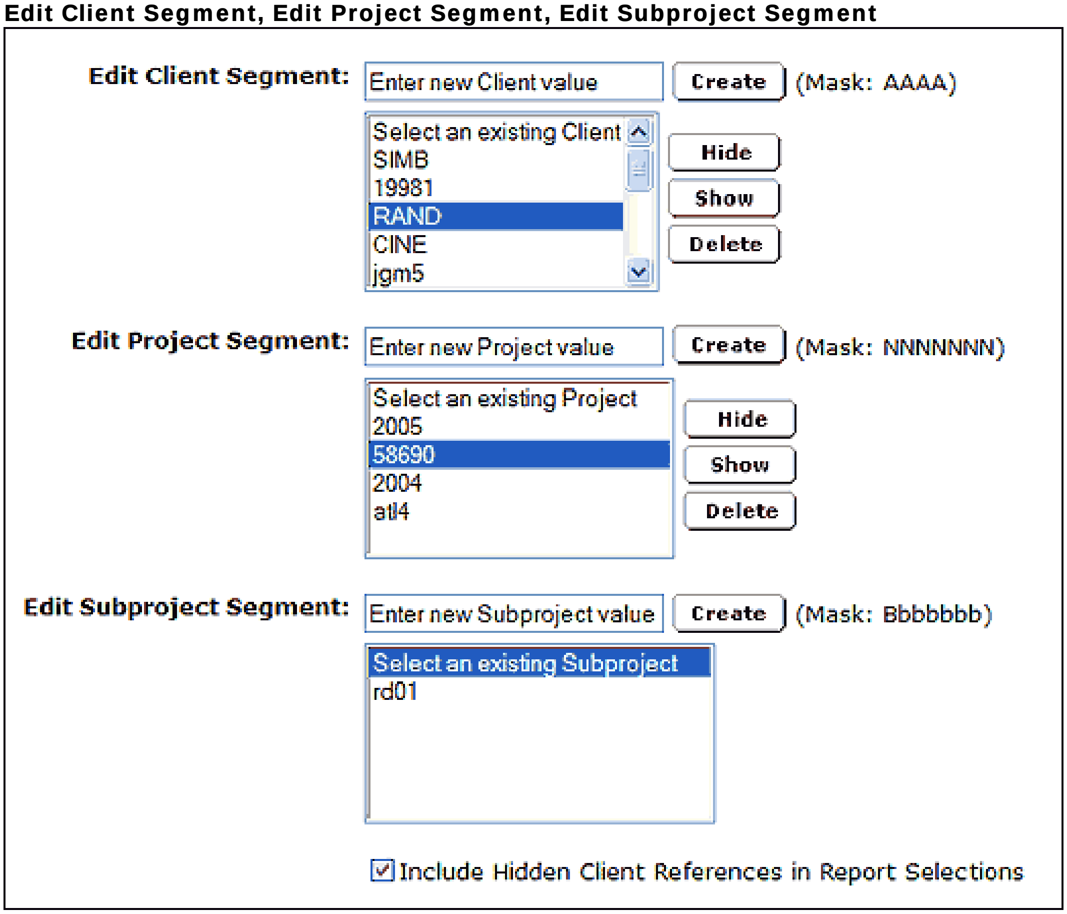
Alternatively, a blended approach to this issue would allow the Administrator to control the Client segment (and the Project segment, if desired) and distribute the management of (Projects and) Subprojects to the user community. This would permit a level of consistency at the Client and Project levels, while providing flexibility to the user at the Subproject level.

Enter and Edit Client Reference Segments
Use the **Edit Client Segment, Edit Project Segment** and **Edit Subproject Segment** fields to add client information into the system — or to edit client information previously entered.

If using multiple Client Reference segments (Client, Project, Subproject), as you complete the information for one segment, another segment displays until all the segments you have indicated you want to use have displayed.

Each segment of a multiple-segment Client Reference is inextricably linked to the other segments it was related to when it was created. For example, a specific Project created under a specific Client, cannot be used independent of that Client.

Edit Client Segment, Edit Project Segment, Edit Subproject Segment



Enter new Client value, Enter new Project value, Enter new Subproject value
Enter a new Client, Project or Subproject information in the text box provided. Click **Create** to add this information to your account. If Masking is set stipulating that a standard be followed when creating a new client segment, then the required Mask will display next to the field.

Use the **Select an existing Client**, **Select an existing Project** or **Select an existing Subproject** drop down box to select an existing client segment to edit. Once you select an existing client segment, **Hide**, **Show** and **Delete** buttons will appear allowing you to interact with that segment.

Hide, Show and Delete
As an Account Administrator, you can choose to **Hide** a Client Reference segment from the view of your users. The segment will remain in your account and be grayed out in the drop down box on the Tracking Administration page. You can choose to **Show** the segment again at any time. You can **Delete** a segment at any time — deleted segments cannot be retrieved. Hidden and deleted segments can no longer be selected by users for future tracking, but they

will continue to be included on reports of past activity.

Include Hidden Client References in Report Selections
Check this box to include hidden Client References in reports. This will display hidden Client References in reports that your users see if those users have previously tracked against those now hidden Client References.

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4. ***Select Billing Cost:***
Use the Select Billing Cost fields to set cost allocation options for your account.

Use
Select type of costs you want shown for users' actions on Tracking reports.

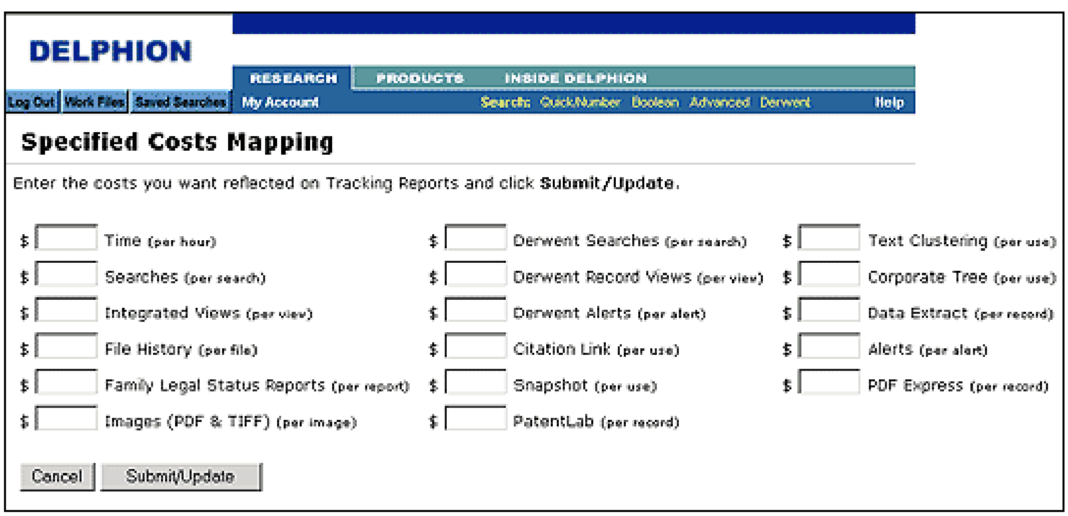
Select **Actual Transaction Costs** to report transactional costs that are incurred with use of Delphion per the terms of your company's Delphion subscription. Note that use of this option may not provide a direct means for recovery of subscription costs. The default is Actual Transaction Costs.

Select **No Transaction Costs** to capture no cost information. Use this option if your company is only interested in capturing and reporting time- and/or activity-based usage information.

Select **Specified Transaction Costs** to specify unit costs for tracked activities, including time. Reports generated with this information can be useful for cost recovery or establishing the basis for your company's charges to clients.

Specified Costs Mapping link
Click the **Specified Costs Mapping** link to display the **Specified Costs Mapping** screen to input the costs you want shown on Tracking reports.

Specified Costs Mapping screen
Enter the costs you want shown on Tracking reports.



Enter a cost in the text entry box associated with each item for which you want to assign costs. Costs can be entered in dollars and cents. Click **Submit/Update** to update your account.

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5. ***Update:***
Click **Update** to update your account with the choices and edits you have made. Note that some choices and edits (like creating a new Client Reference segment and specifying costs) are submitted as soon as they are made.

   Click **Cancel** to cancel choices or edits that have not already been submitted and accepted.

   > **Note:** Administrative changes are not reflected to users who are logged in *while* the changes are being made. The next time the user logs in, however, the changes will be reflected. This could mean that one of your users sees an account change that another user temporarily does not see. Additionally, if you perform research as a user with your Administrator ID, you will need to log out and log back in to see changes you made as an Administrator.

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