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Account Administrator Considerations for Configuring Tracking Functionality

This Tracking Help page is for Group/Corporate Account Administrators. This page discusses things Group/Corporate Account Administrators will want to consider prior to configuring an account for the first time.

For help with overall account administration (excluding Reporting), please see: [Tracking Help for Group/Corporate Account Administrators](#). For Account Administrator Help on Reporting, please see: [Tracking Report Help for Group/Corporate Account Administrators](#).

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](#).

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Overview of tracking features:

Tracking supports client chargebacks for legal and consultative practices — as well as interdepartmental expense allocations in corporate environments. Tracking features include:

- Easy tracking and reporting of time/costs
- Detailed tracking of activities (through research "trails")
- Detailed listing of research trail activity
 - Time
 - Downloads, Alerts, other transactional items
 - Searches
 - Record views
 - Feature use (Snapshot, Clustering, Corporate Tree, etc.)
- Use of trail details as replicable search histories
- Flexible and comprehensive reporting options
- Ability to choose billing costs to capture: Specified Transaction Costs, Actual Transaction Costs, or No Transaction Costs

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Summary of considerations:

There are a number of issues you may want to think about in preparation for setting up Tracking on your account, including:

- What items/activities to track, and how much detail to include

- Whether to make tracking mandatory or optional
- How many tiers of the 3-part Client Reference to use for your account
- Whether or not to use a flexible or pre-defined format for Client Reference number and, if so, determining the criteria
- The period of inactivity after which a research trail should automatically end
- What type of cost information should be used in reporting and, if choosing to use specified costs, what amounts to charge for items being tracked

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Items to track and how much detail to include:

You can configure your company's account to track time and various activities routinely performed on Delphion, including: Date/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.

In determining whether to track time, you should consider whether your organization wants to charge back clients based on time spent on the site. You may also wish to track billable activities (e.g. document downloads, Data Extract and Snapshot) to enable proper chargeback for transactional charges incurred on your Delphion account. Additional information about transactional items for different subscription levels can be found on the [Subscription Comparison Overview](#).

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. For more information about Delphion security measures, see [FAQs: Security, Privacy & Reliability](#)

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Mandatory or Optional Tracking:

Based upon the needs of your organization, the Administrator can enable Mandatory Tracking, requiring users to provide a Client Reference upon login. If it is a requirement that all work done on Delphion be charged back to a client, you should consider making tracking mandatory.

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: Basic Client Reference functionality will automatically be enabled for *all* subscribers upon login. This is why the Tracking Console appears even if Tracking is turned off. Advanced functionalities, however, are only enabled when Tracking is turned on by the Account Administrator.

When Mandatory Tracking is turned on for an account, the user will be required to provide a Client Reference before doing any work on Delphion. Upon login, users will be sent to a Mandatory Tracking page like this one:



Client Reference

Use Last Client Reference: CINE-1998004-008e

Set Client Reference: 1 - Client: OR

2 - Project: OR

3 - Subproject: OR

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Determining number of Client Reference segment:

Delphion Tracking includes a 3-segment Client Reference hierarchy that can easily be configured to match your company's accounting charge code standards.

Client References can be configured to use from one to three segments of hierarchy (client, project, sub-project). 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 sub-project (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.

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Level of user authority in creating Client Reference

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 sub-projects; 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) sub-projects 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 sub-project level.

When selecting a Client Reference, end users will only see segments that you have chosen to use for your account. For example, if you choose to only use the Client and Project segments of the Client Reference, users will not see a field for Subproject.

In addition, if you choose to only allow end users to add new Projects, but do not allow them to add new Clients, then only Project will have the text entry box available on the Tracking page. In this scenario, end users will be forced to select a Client from the dropdown list, but will have the option to create a new Project.

Start New Trail

Use Last Client Reference: CINE-1998004-009

Set Client Reference: 1 - Client:

2 - Project:

3 - Subproject: OR
(Mask: Bbbbbbb)

Format Key

Required: A = alpha N = numeric B = alpha or numeric

Optional: a = alpha n = numeric b = alpha or numeric

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Flexible or pre-defined Client Reference formats

The formatting of Client Reference information is also integral to data uniformity and compliance with your company's accounting charge code standards. The Delphion Tracking functionality incorporates "masking," which allows the Account Administrator to control the way client references are entered by defining what type of characters and how many should be allowed for each field. Use of masking enforces these standards by requiring users to enter Client Reference segment information in the prescribed format.

If Masking is turned on for an account, end users will see the required format and a format key whenever they select a Client Reference. If the wrong format is entered, the user will receive an error message upon clicking the Start Tracking Now button.

DELPHION

Tracking RAND-2005-chi003
Select Time 00:16:13

RESEARCH PRODUCTS INSIDE DELPHION
Search: QuickNumber Boolean Advanced Derwent Help

Log Out Work Files Saved Searches My Account
Help

Tracking

Start New Trail

Use Last Client Reference: RAND-2005-chi003

Set Client Reference: 1 - Client: OR
(Mask: AAAA)

2 - Project: OR
(Mask: NNNN)

3 - Subproject: OR
(Mask: AAANNH)

Format Key
 Required: A = alpha N = numeric B = alpha or numeric
 Optional: a = alpha n = numeric b = alpha or numeric

Current Trail

Activity	Details	Date/Time	Client Charges
Start Trail		2004-09-23 10:09 AM	

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Automatic termination of Tracking after period of inactivity:

The Administrator has the ability to select the lapse in time whereby a tracking session is ended due to inactivity. Inactivity is described as a dormant period where there is no further navigation to other areas of the Delphion website or use of productivity or analysis tools. Various options are available on Delphion to accommodate your organization's billing practices (e.g. 15-, 10- and 6-

minute increments).

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Cost information Reporting:

Delphion Tracking provides cost/charge reporting. The Admin selects one or more of the following from the Reporting Preferences screen:

- Specified Charges: Delphion subscribers assign values for any tracked activities via the Specified Cost Mapping screen. Specified Charges can be used to generate client billing reports.
- Actual Charges: Reports transactional costs that are incurred with use of Delphion per the terms of your company's Delphion subscription. Note that use of this option does not provide a direct means for recovery of subscription costs.
- Specified Unit Charge: Delphion subscribers assign values for any tracked activities billed on a per-use basis via the Specified Cost Mapping screen. Specified Unit Costs can be used to display the assigned unit values on reports which can be used for client billing.
- No Charges: From the Reporting Preferences screen, Admin may toggle the costs display on or off.

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Overall Reporting options:

You can set separate reporting options for administrator reports and for end user reports. For any items you have chosen to track, you can decide whether or not to show that item on user reports or on administrator reports. In order to show an item on any report, it must be tracked (checked on the Tracking Administration page).

Reporting Preferences

Check the items you want to show on your tracking reports and click **Submit/Update**.

Global User Preferences
Administrative Preferences

Activities:	Report Columns:
<input checked="" type="checkbox"/> Time <input checked="" type="checkbox"/> Searches <input checked="" type="checkbox"/> Integrated Views <input checked="" type="checkbox"/> File Histories <input checked="" type="checkbox"/> Family Legal Status Reports <input checked="" type="checkbox"/> Images (PDF & TIFF)	<input checked="" type="checkbox"/> Derwent Searches <input checked="" type="checkbox"/> Derwent Record Views <input type="checkbox"/> Derwent Alerts <input checked="" type="checkbox"/> Citation Link <input checked="" type="checkbox"/> Snapshot <input checked="" type="checkbox"/> PatentLab <input checked="" type="checkbox"/> Text Clustering <input checked="" type="checkbox"/> Corporate Tree <input checked="" type="checkbox"/> Data Extract <input checked="" type="checkbox"/> Alerts <input checked="" type="checkbox"/> PDF Express Select/Unselect All
	<input checked="" type="checkbox"/> Activity <input type="checkbox"/> Details <input checked="" type="checkbox"/> Order Number <input checked="" type="checkbox"/> Quantity <input checked="" type="checkbox"/> Date/Time <input checked="" type="radio"/> Show Date & Time <input type="radio"/> Show Date Only <input checked="" type="checkbox"/> Specified Unit Charges <input checked="" type="checkbox"/> Specified Charges <input checked="" type="checkbox"/> Actual Charges

Include Hidden Client References in Report Selections.

Reports can be run for any period, for all Clients/Projects/Subprojects or a specific one and for all users on an account or for a specific one. End users have all of the same options except for the choice of users — they can only generate reports on their own activity.

Each trail is shown on a separate line on a report, and the report columns can be sorted. Reports can be viewed in a printer-friendly format, downloaded in CSV (spreadsheet) format or emailed in HTML format.

Report

[Export to CSV file](#) |
 [Export to CSV file with Trail Details](#) |
 [Email This Report](#)

<input type="checkbox"/>	Date/Time	Client Reference	User Name	Total Time	Specified Charges	Actual Charges
<input type="checkbox"/>	2004-09-22 10:47	CINE-1998002-sub003	Karen Smith	0:02:33	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-22 12:48	CINE-1998001-Phase 1	Susan Smith	0:30:00	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-23 11:17	CINE-1998004-008	barbara jones	0:09:51	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-23 11:27	CINE-1998003-008	Karen Smith	0:09:47	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-23 19:58	CINE-1998001-Phase 1	Susan Smith	0:16:36	\$ 18.00	\$ 18.00
<input type="checkbox"/>	2004-09-27 6:55	CINE-1998004-Phase 1	Susan Wong	0:00:43	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-27 7:11	CINE-1998003-008	Karen Smith	0:02:34	\$ 0.00	\$ 0.00
<input type="checkbox"/>	2004-09-27 7:14	HEFE-2003001-Phase 1	barbara jones	0:31:46	\$ 16.00	\$ 16.00
<input type="checkbox"/>	2004-09-29 14:46	CINE-1998002-0929ielk	Susan Smith	0:39:52	\$ 14.50	\$ 10.00

A research trail shows the activities performed by a user during a single Tracking session. Depending on preferences set in Tracking Administration overall and on preferences set for Reporting, trails can include Details. Details provide specific information about each activity.

Research Trail[Return to Reporting](#)**Client Reference:** CINE-1998004-008e
Date: 2003-11-23 **Total Time:** 02:50:00**User:** Jeff Morrow
Company: Smith & Smith, LLP[Export to CSV File](#) | [Email this Trail](#) | [Hide Trail Details](#)

<input type="checkbox"/>	Activity	Details	Date/Time ▼	Client Charges
<input type="checkbox"/>	Start Trail		2003-11-23 08:35:07AM	
<input type="checkbox"/>	Search	(Coffee) 4,442 / 3,356,197 US Granted, US Applications	2003-11-23 08:52:07AM	
<input type="checkbox"/>	Integrated View	US06501779	2003-11-23 08:53:07AM	
<input type="checkbox"/>	Download Image	US06501779 (PDF)	2003-11-23 08:54:07AM	\$3
<input type="checkbox"/>	Snapshot	100 items Assignee, Attorney, Application Year	2003-11-23 09:34:07AM	\$15
<input type="checkbox"/>	Text Clustering	100 items 20 Clusters	2003-11-23 09:57:07AM	\$15
<input type="checkbox"/>	PatentLab	100 items Biblio / Abstracts	2003-11-23 10:12:07AM	\$15
<input type="checkbox"/>	Integrated View	US05551212	2003-11-23 10:18:07AM	
<input type="checkbox"/>	Family Legal Status	US05551212 17 members	2003-11-23 10:25:07AM	\$7
<input type="checkbox"/>	File History	US05551212	2003-11-23 10:37:07AM	\$20
<input type="checkbox"/>	Corporate Tree	IBM 88550 <in> assignee code	2003-11-23 10:39:07AM	\$15
<input type="checkbox"/>	Derwent Search	(text) 403,476 / 181,240 DWPI	2003-11-23 11:06:07AM	\$4
<input type="checkbox"/>	Derwent Record	2003-531459	2003-11-23 11:16:07AM	\$6
<input type="checkbox"/>	Pause Time Tracking		2003-11-23 11:18:07AM	
<input type="checkbox"/>	Continue Time Tracking		2003-11-23 11:28:07AM	
<input type="checkbox"/>	Search	(Coffee) 4,442 / 3,356,197 US Granted, US Applications	2003-11-23 11:30:07AM	
<input type="checkbox"/>	End Trail		2003-11-23 11:35:07AM	
<input type="button" value="Hide"/> selected <input type="button" value="Show"/> all hidden			Total:	\$100

[Printer-friendly version](#)[\[back to top\]](#)**Next steps:**

For help with overall account administration (excluding Reporting), please see: [Tracking Help for Group/Corporate Account Administrators](#).

For Account Administrator Help on Reporting, please see: [Tracking Report Help for Group/Corporate Account Administrators](#).

Your end users should review [Tracking Help for Group/Corporate Account End Users](#) — you will want to review this page also.

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