DELPHION

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Updated: Jan 4, 2005

Tracking Help for Individual Users

This Tracking Help section is for individual Unlimited and Premier credit card subscribers and individuals using a free Basic registration.

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

If you are an Account Administrator for a group/corporate account, please see: Tracking Help for Group/Corporate Account Administrators.

- What Tracking and Client References are
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What Tracking and Client References are:

Tracking is an optional feature available to all users (including Basics) that allows you to create and assign a unique identifier, a *Client Reference*, to transactions conducted on Delphion.

Use Tracking to support chargebacks in legal and consulting firms, to allocate inter-departmental costs, verify expenses for audit activities, or for internal project identification.

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Trails:

A *trail* is a list of all of the activities tracked against a single Client Reference during a Delphion session. Sessions can have multiple trails, although only one trail can be active at a time.

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What items can be tracked:

Unlimited and Premier individual credit card subscribers can track any billable Delphion transaction (e.g., Special Order PDFs, Derwent searches, Derwent Record Views and File Histories).

Basic users can track single downloads and PDF Express bulk downloads — which are the only billable transactions allowed at this service level.

Individual subscribers (Unlimited, Premier or Basic) cannot track elapsed time, search details or Delphion Integrated Views. Time, search details, record views and feature use can all be tracked by users on Delphion group/corporate accounts — find out more.

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Where Client References appear:

Client References appear on the Tracking Report you access from the Tracking page. Previously, Client References appeared on your Order Form — the newest Tracking enhancements give you a consolidated Tracking Report instead.

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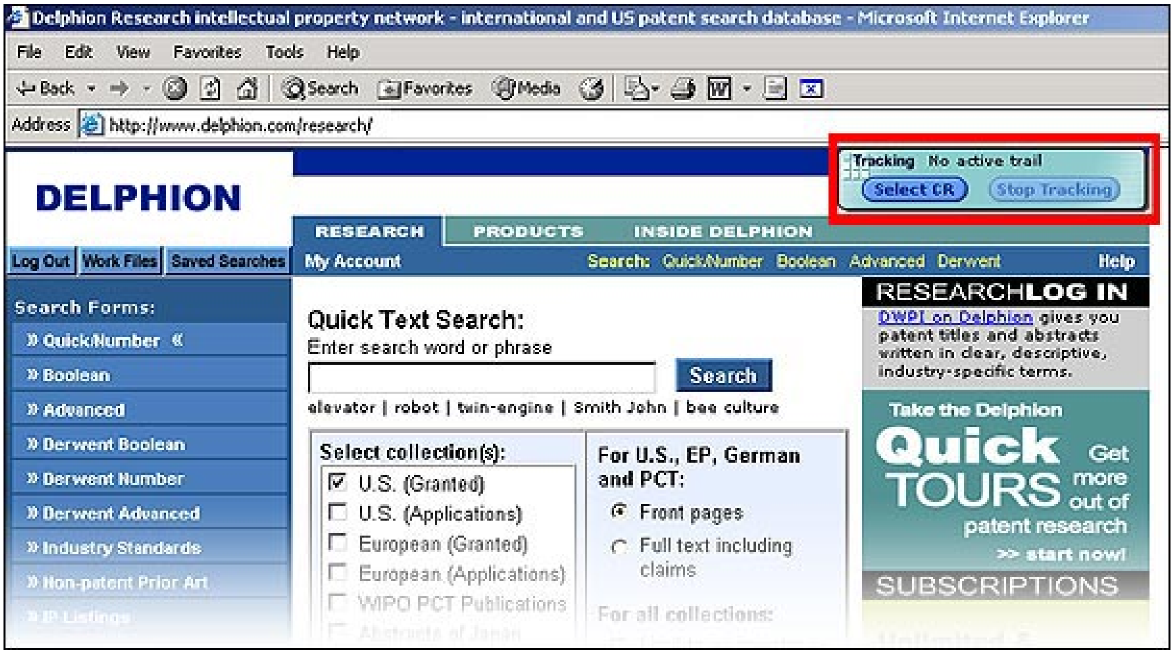
Accessing Tracking:
Once you have logged in, you will see the Tracking Console in the upper right of your screen. This Tracking Console appears on every page of the site while you are logged in.



Click the **Select CR** button to access the Tracking page, then select or create a Client Reference and begin tracking.

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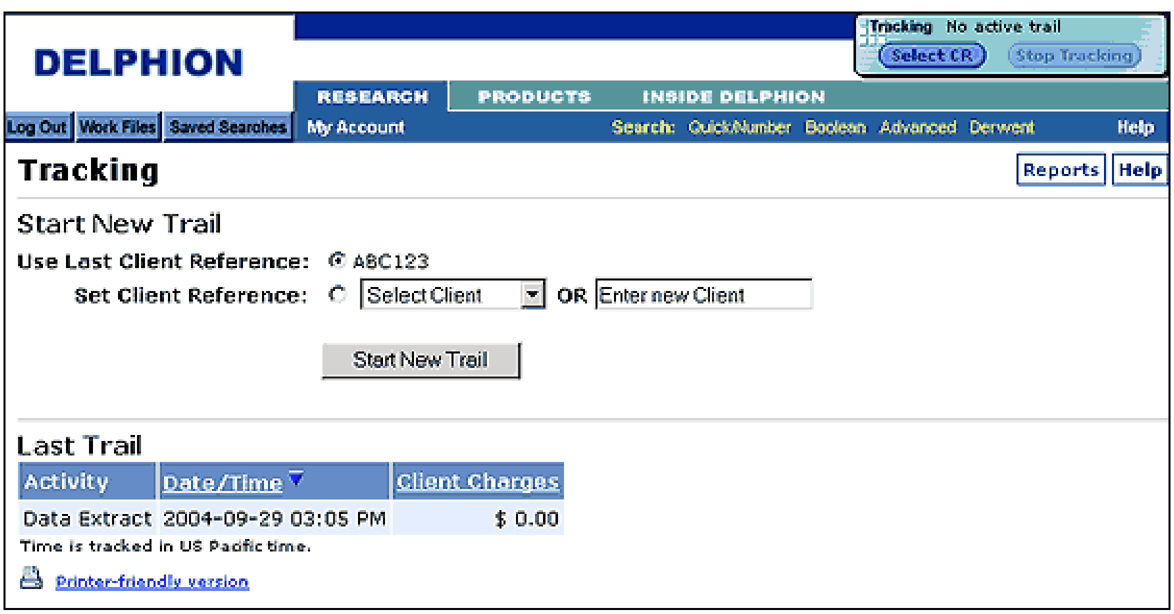
Tracking:
Use the Tracking page to select an existing Client Reference or enter a new one. Click the **Start New Trail** button to begin tracking.



Once you have started tracking, your transactions will record against the active Client Reference.

Click the **Select CR** button on the Tracking Console to go to the Tracking page to view your current trail. As long as you do not change the Client Reference or click Start New Trail your tracking session will continue.

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Stopping Tracking:
Stop tracking by clicking the **Stop Tracking** button in the Tracking Console. Once tracking is stopped, the Tracking page displays and you will be able to view your last trail. Tracking stops automatically if you select a different (or create a new) Client Reference and click **Start New Trail**.

* Tracking Trail is stopped.

Tracking

Start New Trail

Use Last Client Reference: XYZ456

Set Client Reference: Select Client **OR** Enter new Client

Start New Trail

Last Trail

Activity	Date/Time	Client Charges
Data Extract	2004-09-29 05:53 PM	$ 0.00
PatentLab-II Bibliographic data	2004-09-29 05:54 PM	$ 5.00
PDF document (download)	2004-09-29 05:55 PM	$ 0.00
Derwent WPI standard search	2004-09-29 05:56 PM	$ 4.00
View Full Derwent WPI Record	2004-09-29 05:56 PM	$ 6.00

Time is tracked in US Eastern time.

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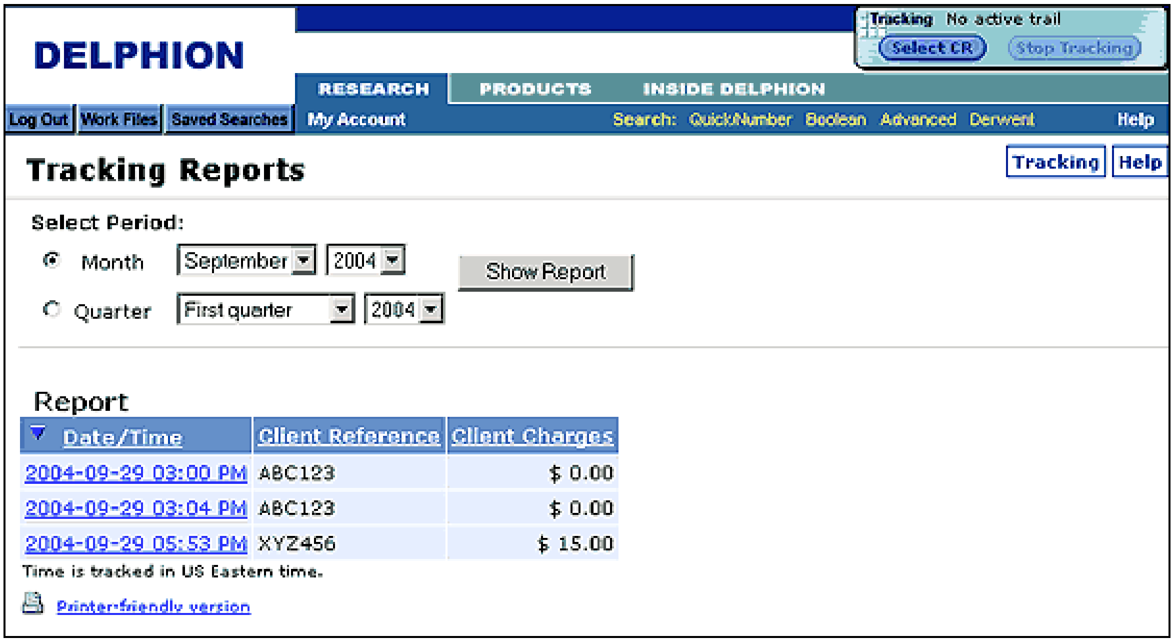
Tracking Reports:
Access Tracking Reports from the **Reports** button in the upper right of the Tracking screen.



The **Tracking Reports** page automatically displays the report for the default period — which is the current month. Optionally, you can select another month or request a report covering a full quarter or the entire year.

The body of the report shows the Date/Time, Client Reference and Client Charges for a trail.

Click the hyperlinked Date/Time entry for the trail you want to review in more detail. The Trail page for the selected trail displays.

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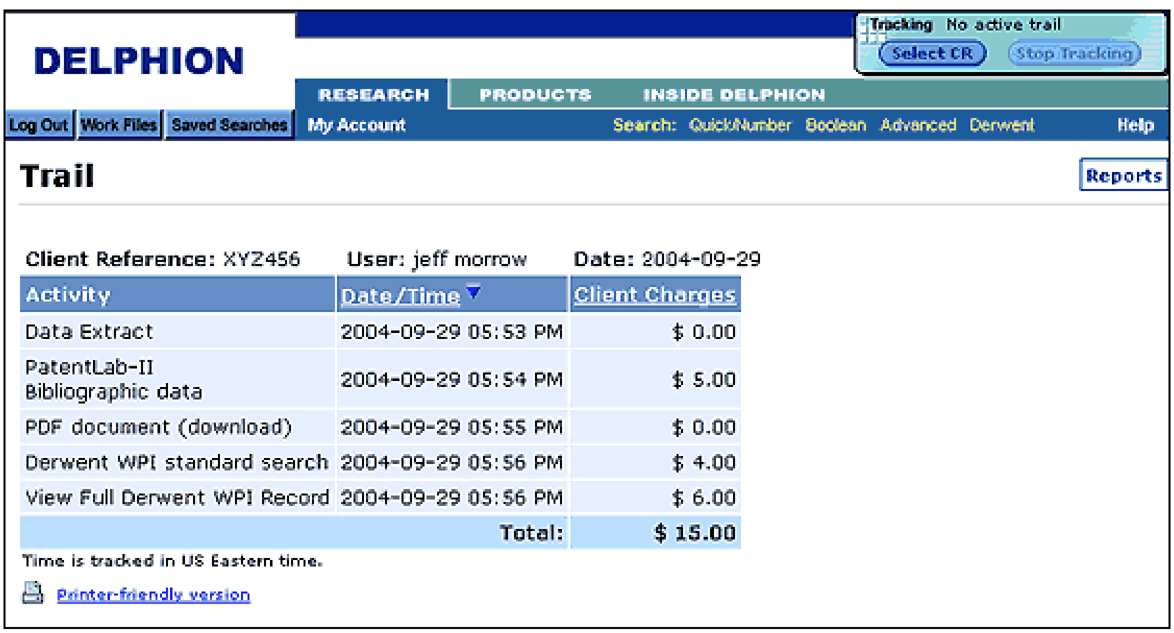
Trail details:



The trail details page displays:

- Client Reference
- Type of activity
- Date/Time activity was performed
- Cost of individual activities/transactions
- Total cost for the trail

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