

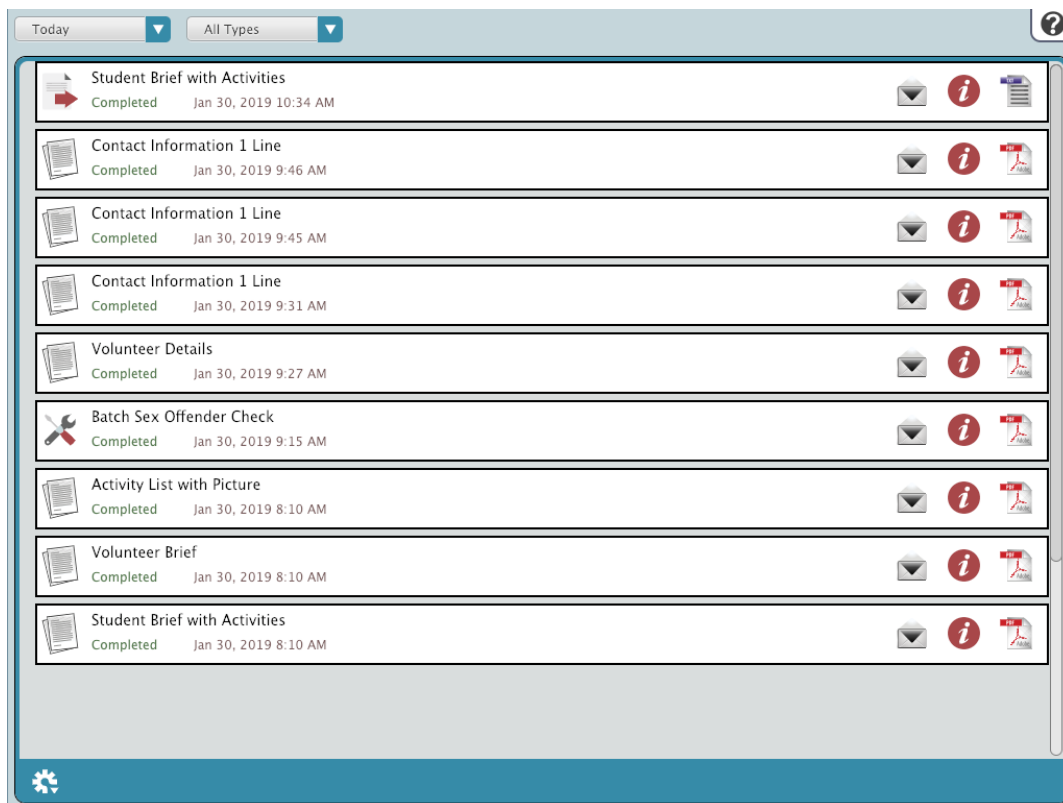
# Operations

## Contents

## About

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Operations Management automatically orders/sorts all pending operations (i.e. reports, utilities, imports, or exports) and allows you to view summaries and open, email, or save operations that you (or others) have previously completed. Simply think of the Operation Management window as a nerve center that consolidates all past and future operations that you, the current user, the system, or others have been performing.



Once a report, utility, import, or export has been initiated, it will be queued in the Operation Management interface. You are able to access this interface everywhere throughout KeepnTrack's Administration when clicking the Operation Management icon. After gaining access to Operation Management, you can start tracking the progress of the current operation and view (or save) previously completed operations. Completed operations shown in the "queue" include the name and status of the operation and are affixed with a time/date stamp. An operation that is currently running provides a Cancel option.

Each time Operation Management is opened, the Date Range drop-down filter at the top of the interface defaults to Today; in other words, only the current user's newest operations are initially visible in the Operation Management's queue. Everything in this list is ordered chronologically (newest-to-oldest in top-down order) which is helpful when trying to discover if there are any operations in the queue ahead of yours. The Operation Type drop-down filter defaults to All Types; the All Types selection includes pending (or completed) automatic system operations.

For reasons of accountability and transparency, the Operation Management window will retain all information for canceled and completed operations for a week at least; operations older than a week can be removed from the queue by choosing one of the Remove Older Than XX Days selections from the Operation Management's Actions menu. By default, all operations older than ninety days are automatically removed from the Operation Management window.

 By default, reports are generated in PDF format. We recommend using the *most current* version of [Adobe Reader](#) as your default PDF viewer.

# Operations

Operations Management displays the name and status of the operation, the user who initiated the operation, and the time/date that the operation was completed or canceled. By default, it only provides a quick glimpse at the operations that you, the current operator, have performed or queued.



One of four different icons can appear to the right of each completed operation in the queue; an open Send Email window icon, an operation information icon, an open report icon, and a download file icon.



## Email

This opens the Send Email window, where you can email a link to download and view the operation file.



## Information

Completed operations display very little information in the queue; they have a completion date, operation name, and the operator who created it. Click this icon to view additional information for each operation—such as *new* or *modified* records, associated error messages and notes. If an error occurs during an operation, an alert icon will appear in the summary to let you know that you should pay special attention to the results; alerts and exceptions contained within your PDF are printed in red.



## Text File

If the operation is an export, click this icon to download a text file. The file can be viewed in a text editor, such as Notepad or TextEdit.



## PDF

Click this icon to download your saved report as a PDF.

## Send Email

The Operation Management window has integrated email capabilities. Clicking the Send Email button opens the Send Email window which allows you to send a downloadable link to the completed operation file.

### Email To

Send a downloadable link to the PDF or other completed operation files by providing email addresses (john.doe@example.com) in the Email To field. You can list more than one email address separated by commas (john.doe@example.com, janedoe@example.com).

### Subject

Use this optional field to provide brief summary of the email attachment (e.g. "Requested Barcode Laser Label Reports" or "A file is available for your retrieval"). By default, KeepnTrack provides the name of the completed operation as the subject by default.

### Note

This optional field allows you to append text to the bottom of the email message.

# Controls

The controls at the top of the interface allow you to filter your results.



## Date Filters

Depending on your security settings, this drop-down menu can contain two sections; everything above the line is visible for the current user (i.e. an operator's operations) and everything below the line is every user's operations.

- Today
- Last 7 Days
- Last 30 Days
- 30 - 60 Days Ago
- 60 - 90 Days Ago

## Type Filters

Select an option to view all of the operations performed or queued by you.

- All Types
- Exports
- Imports
- Reports
- Utilities
- System Reports

## Actions Menu

The Actions menu is located in the bottom left corner of the window.

By default, all operations older than 90 days are automatically removed from Operations Management.

- Show All Operations
- Remove Selected Operations
- Remove Older than 7 days
- Remove Older than 14 days
- Remove Older than 30 days
- Remove Older than 60 days