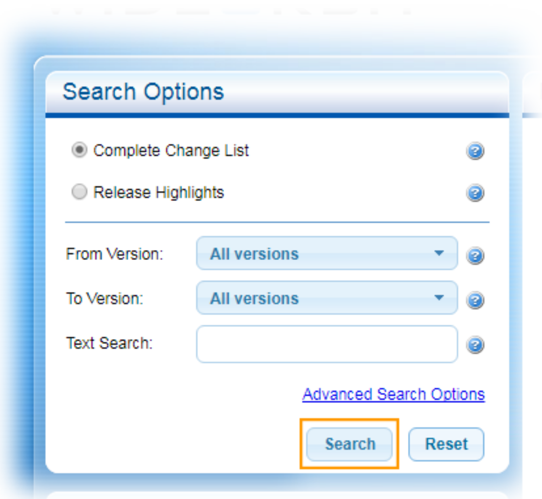
Using the Release Notes tool

Creating the report - *Your way*

The default setup

The **Release Note** tool can pull every *WO Media Sales* **Release Note** documented since version 6.5 was released and produces a very large and unwieldy document. Learn to use the **Release Note** tool's filtering features to create more concise, userfriendly reports.

Simple Search Options



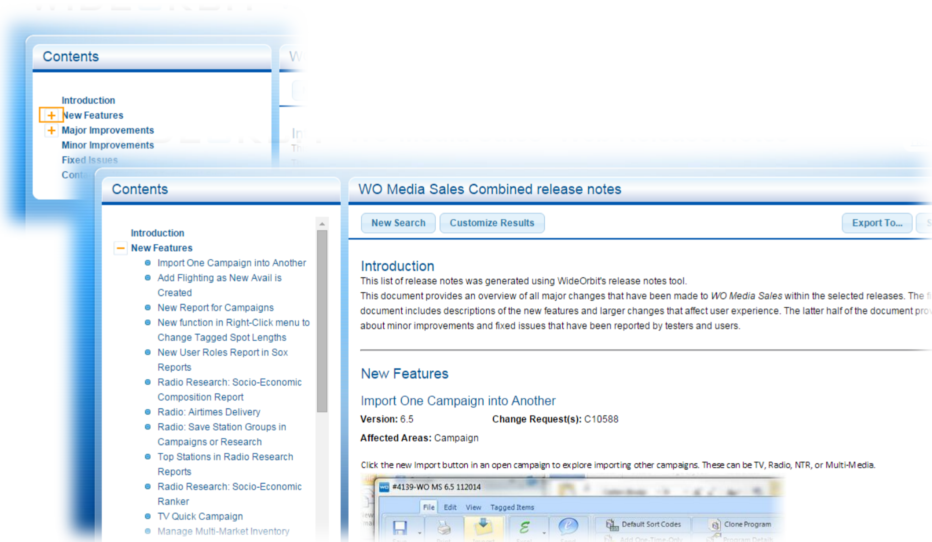
Leave the first option set to **Complete Change List**. This is a basic build report.

The **From Version** and **To Version** filters work together. Click the drop-down menu of either to see all released versions. To discover all the **New Features**, **Enhancements**, and **Fixed Issues** to be included in a possible upgrade, choose the first version *after* the currently installed version with the **From Version** drop-down menu. Select the prospective upgrade version with the **To Version** drop-down menu, and then click **Search**. Every **New Features**, **Enhancements**, and **Fixed Issues** included in the upgrade will be detailed in the resulting query.

A case number can be entered in the **Text Search** field. Click **Search** and only that specific case will be presented. A text string surrounded by quotes will pull all **Release Notes** that include the submitted text string.

Search Results

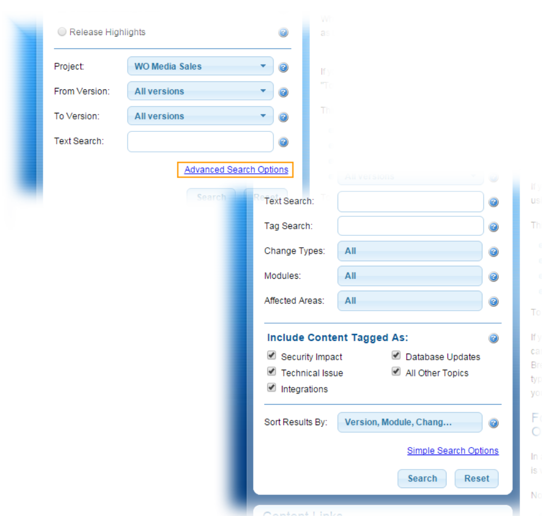
Take a look at the results. The combined **Release Notes** populate the content area on the right, and a table of contents is produced in the panel on the left. Click the **+** by **New Features** or **Major Improvements** to expand it, and click to move straight to specific cases by their title/description.



And there are many more ways to filter.

Advanced Search

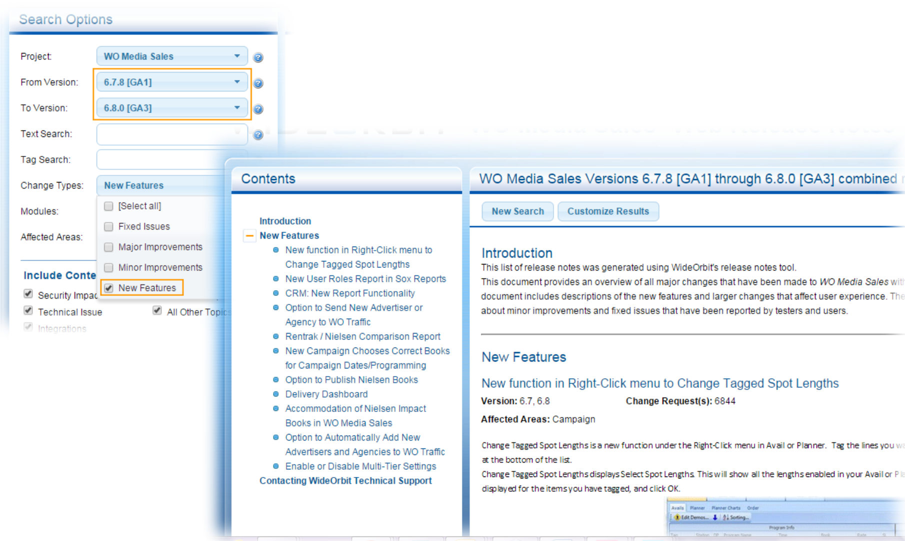
Account Managers, **Support Reps**, and **Users** have varying needs in **Release Note** documentation. The **Release Notes** tool's **Advanced Search Options** offers a myriad of ways to customize the documents created. Click the **Advanced Search Options** link just below the **Text Search** field.



Using these additional filters along with the modifiers in the **Simple Search Options** offers the ability to drill down to just a few cases.

Change Types

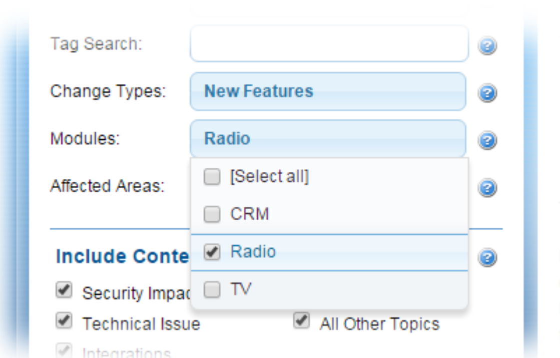
An **Account Manager** might want to pull a report showing all **New Features** added since the client's current version. That's easy. Just select that version from the drop-down menu of **From Version**, and select the latest version under **To Version**. Choose **New Features** from the **Change Types** drop-down menu and click **Search**. The report now has only the cases the account manager wants to see.



A **Support Rep** might need to see all fixed issues between a series of versions. Use the **From Version** and **To Version** modification method, but select **Fixed Issues** under **Change Types**. A report showing just **Fixed Issues** will be produced.

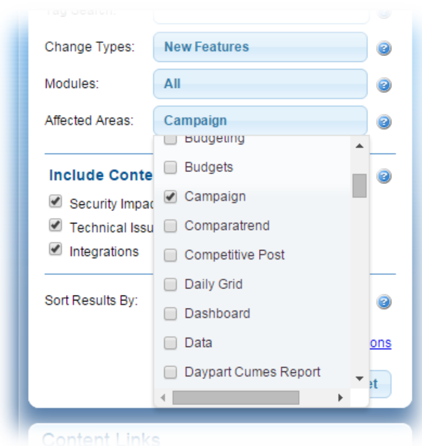
Modules

The **Modules** drop-down menu allows the report to display only the cases for one, two, or all of the *WO Media Sales* modules. Select the module needed. Get even more specific by combining this type of search with the **Versions** and **Change Types** filters.



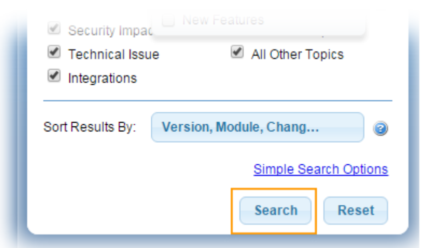
Affected Areas

To see **New Features** found only in **Campaigns**, filter with the **Affected Areas** drop-down menu. Make sure only **Campaign** is selected. The possible variations are endless.



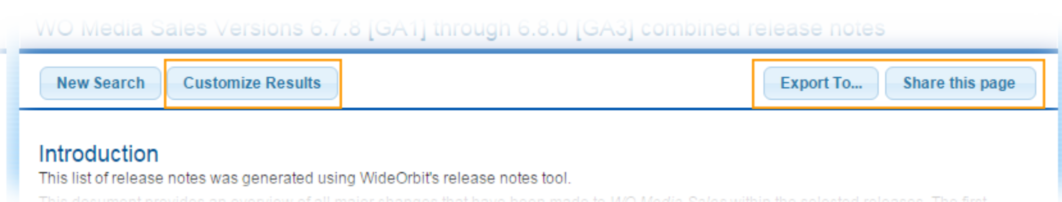
Caution: Selections will persist in subsequent sessions of the **Release Notes** tool, even if the **Advanced Search Options** features are not visible. Click **Reset** to start a new search.

Click **Search**, and the **Release Notes** tool generates the report.



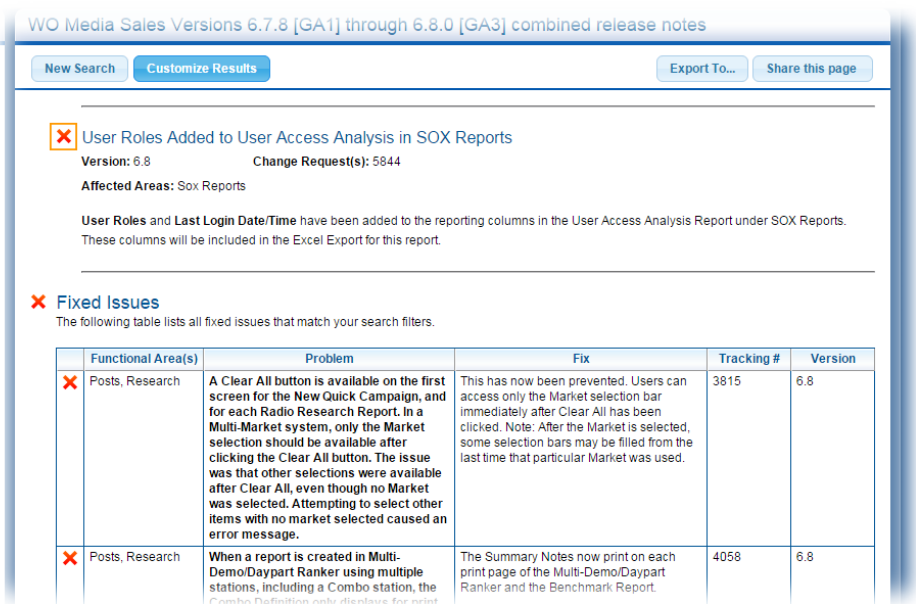
But wait, there's more!

The buttons displayed across the top of the results pane allow users to further modify the report. Click **Customize Results**.



Customize Results

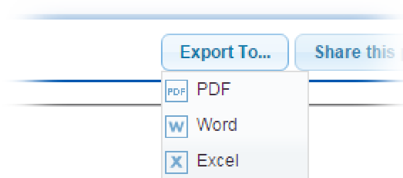
If the report is still pulling more information than needed, the **Release Notes** tool allows cases to be cherry-picked for deletion. Click the **X** by all unwanted cases to remove them.



When the report has been modified to perfection, there are a number of options for its final usage.

Exporting the report

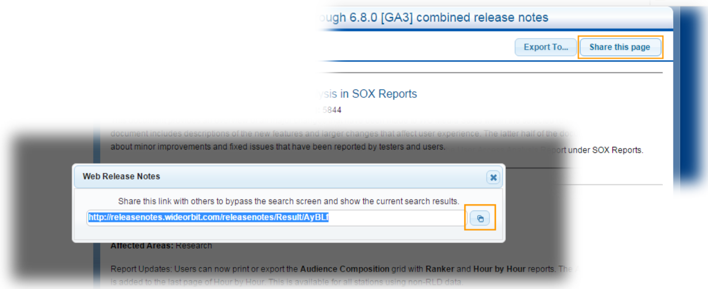
Click the **Export To** button to display a drop-down menu of export options. Choose **PDF** from the menu, and a **PDF** is generated and opened for review. Select **Word** for the option to save the report as a .doc file to a local hard drive or network. Or, choose to save the report as an **Excel** file.



Caution: Images are not included in the **Excel** export of the report.

Sharing your results

If the document needed is still too large for emailing even after all unneccessary items have been filtered out, simply share the document by producing a URL of the custom results. Click **Share this page** and a hyperlink is produced. Click the **Copy** icon to the right of the link. The URL is copied to the clip board and can be pasted into an email, or saved for producing the identical report in the future.



Take it out for a spin! And please contact the *WO Media Sales* Support with questions or problems.

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