

LEVERAGE

The Newsletter of Tracker Suite® and TrackerOffice®

Volume 1

Tracker Suite 7.0 Released

Improved reporting, workflow and security

Automation Centre recently announced the release of Tracker Suite® 7.0 for Lotus Notes. A free demo CD may be ordered at www.TrackerSuite.com.

Tracker Suite 7.0 expands the functions of its Web-enabled applications for projects, IT management, HR and sales, in addition to major workflow improvements including an outward-facing CRM model and support for third-party email clients including Microsoft Outlook.

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Project Name	Department	Warning	%	Bud Hrs	Act Hrs	Overdue Tasks	Expected Finish	Slippage	As Of	Status
ADV Board	Department A	Schedule	0	400	0	1	7/31/2003	244		Active
Airport Renovation	Department A	Schedule	0	100	0	11	7/8/2004	0		Active
Automation Centre PSA Retainer	Department A	Schedule	0	1	0	3	12/31/2003	91		Active
AVON	Department A	Schedule	0		0	2	3/24/2004	7		Active
bottle	Department A	Schedule	0		0	3	1/21/2004	70		Active
BW Wireless	Department A	Schedule	40		0	1	8/7/2004	0	1/21/2004	Active
Danz Product	Department A	Schedule	0		0	2	9/1/2004	0		Active
Delphi .Net	Department A	Budget	50	700	120	6	10/30/2004	0	2/2/2004	Active
Fluffy Pre Sales	Department A	Schedule	85		0	2	10/8/2002	540		Active
Fluffy Puppy Chew	Department A	Schedule	0	138	0	2	12/31/2003	91		Active
Golden Gate Bridge Retrofit	Department A	Schedule Budget	95	200	96	13	8/7/2003	237	9/19/2003	Active
Help Desk Deployment	Department A	Schedule	0		0	2	7/31/2003	244		Active
IBM CRM	Department A	Schedule	0	300	0	2	11/5/2003	147		Active
IBM CRM Upgrade	Department A	Schedule	0		0	2	10/31/2003	152		Active
Marshall Fields	Department A	Schedule	33	1000	0	0	7/8/2004	0	8/11/2003	Active
Microsoft Marketing Plan	Department A	Schedule	15		0	2	10/10/2003	173	9/5/2003	Active
MS Windows 2003 Upgrade	Department A	Schedule	0		0	2	1/1/2004	90		Active
Office Building	Department A	Schedule At Risk On Hold	20		0	0	7/8/2003	267	8/14/2003	On Hold
Office System	Department A	Schedule	0	300	0	3	9/5/2003	208		Active
PreSales	Department A	Schedule	0		0	2	1/1/2005	0		Active

Configurable reports in Tracker Suite 7.0 simplify project dashboarding

Government Agencies Choose Tracker for Improved Workflow, Security and Reporting

Powerful workflow and reporting features, combined with low TCO make Tracker an ideal choice for IT on tight government budgets

Within the last year, Tracker solutions have been deployed by government agencies, both in the United States and abroad: The State of Louisiana Legislative Auditors, The Nebraska Department of Roads, and the Hertfordshire County Council, in the United Kingdom.

The Hertfordshire County Council licensed Tracker solutions to better manage its IT and voice infrastructure

projects, track budget metrics and review the financials of utilized third-party resources. Hertfordshire County is one of the densest populated counties in England, with over 1 million residents spread across numerous towns and villages.

The Nebraska Department of Roads, which is responsible for the planning,

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Adventures in the Paperwork Jungle



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Tracker 7.0 Release

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Projects

- Individual database configuration for simple or complex budgeting
- New workflow and security model, with greater control over project document access
- Deeper task complexity
 - Task linking and indenting
 - Budget vs. Actual; ETC tracking at task resource level
 - Greater integration with Microsoft Project functions
- Improved status reporting
- New layout and fields for greater detail and accuracy in reports
- Automated reminders now include button with link to report
- Metrics posted to Project Definition Document

Personnel

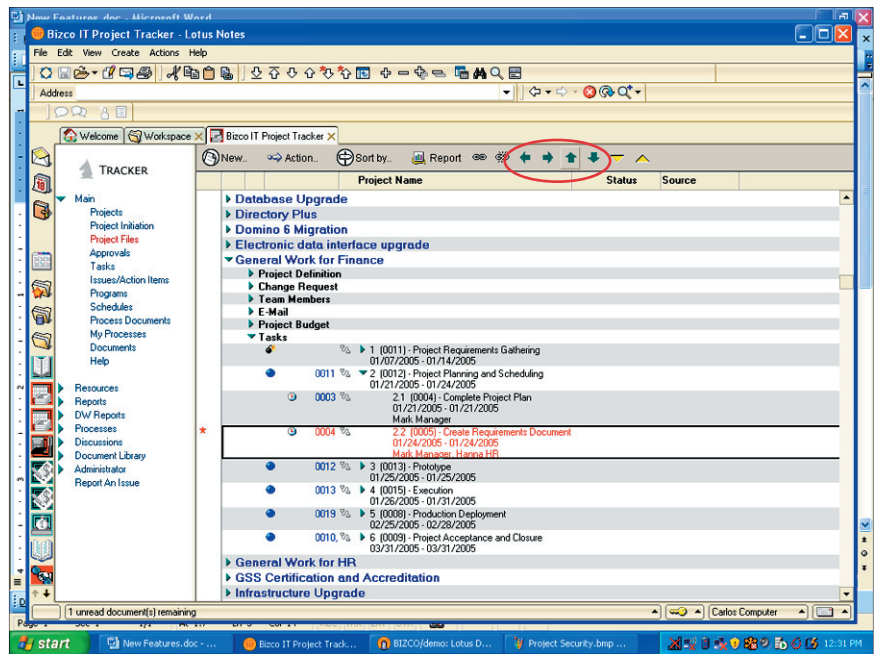
- New workflow engine with proxy approvers
- Out of the office integration with Expense and Purchase Trackers
- New roles for use with Purchase Tracker and other workflow
- Updated change request functions
- Improved asset management and provisioning

Time, Expense and Purchasing

- Now run in Notes, the Web, Websphere and virtually off-line
- Proxy approval/ out of office feature
- New vendor payment process
- Select columns/ formats/ messaging for Time Tracker
- Multiple workflow support in Purchase Tracker

Support Tracker

- Tickets can be created for employee or customer
- Mail-in configuration and threaded response
- Custom field support
- More support for reporting in the Tracker Data Warehouse



Tracker Suite 7.0 offers project task linking and indenting (circled)

- New evaluation submission mechanism, featuring browser evaluation submission
- Automated SLA agent, which sends reminder emails/ escalates tickets when expected response/ completion has passed
- New HR security role

Plans for the Future

The next version of Tracker Suite is already in development. In addition to general improvements to the workflow of its current applications, the new version will feature printable reports, more out-of-the-office workflow functions, and spell-checking for HTML forms. ❖

Customer Tracker

- Support contract documents simplify CRM
- Redesigned UI and functions
- Outward facing CRM allows an organization's customers to submit project and support request forms over the Web
- Highly configurable system allows specific naming of particular document types associated with customers.
- Secure, customer self-service access to their company information over the Web

Data Warehouse

- New, configurable project dashboard report
- Portfolio view
- Computed columns
- Improved graphical reports
- Color priority / critical items
- Improved performance
- Purchase table

TRACKER FAQ

How do I shrink the log file on the Data Warehouse database if it gets too large?

Run this command in the SQL Query Analyzer to truncate the log:

backup log TAC_Datawarehouse with truncate_only

Open the SQL Enterprise Manager and right click on the database and select *All Tasks > Shrink Database*. Click on the *Files...* button and select the log file from the Database File: window at the top, then click OK. Click OK twice more to exit.

Government *continued from pg. 1*

design and construction of state highways, as well as the maintenance of existing highway roads, chose Tracker solutions to better manage their projects, communicate status and progress, and generate reports.

The State of Louisiana Legislative Auditors has approximately 170 auditors working in different locations across the state, who are responsible for conducting financial, performance and CPA audits for every state agency. However, their legacy system was failing to keep pace with their growing demands, and its maintenance costs were quickly transforming it from a tool to a liability.

They wanted the ability to consolidate their systems into a single, distributed system available on line/off line and on the Web. Among the needs they wanted addressed were:

1. Evolving their current paper based system to an online

work paper organization, with document workflow, collaboration and management

2. Resource scheduling and management, with tools for vacation and sick leave tracking, employee hiring and change request handling
3. Audit status reporting
4. Improved organizational intelligence with business reports, particularly ad hoc reporting

Tracker Suite answered these needs, particularly in moving their labor-intensive paper system to Notes' versatile document management model.

The State of Louisiana Legislative Auditors licensed 4 Tracker modules, which were customized to suit their particular needs: Project Tracker, Personnel Tracker, Customer Tracker and the Tracker Data Warehouse.

These modules were installed, configured, deployed and adopted across the organization within 45

days. They quickly realized its ROI as Tracker Suite streamlined and accelerated their processes.

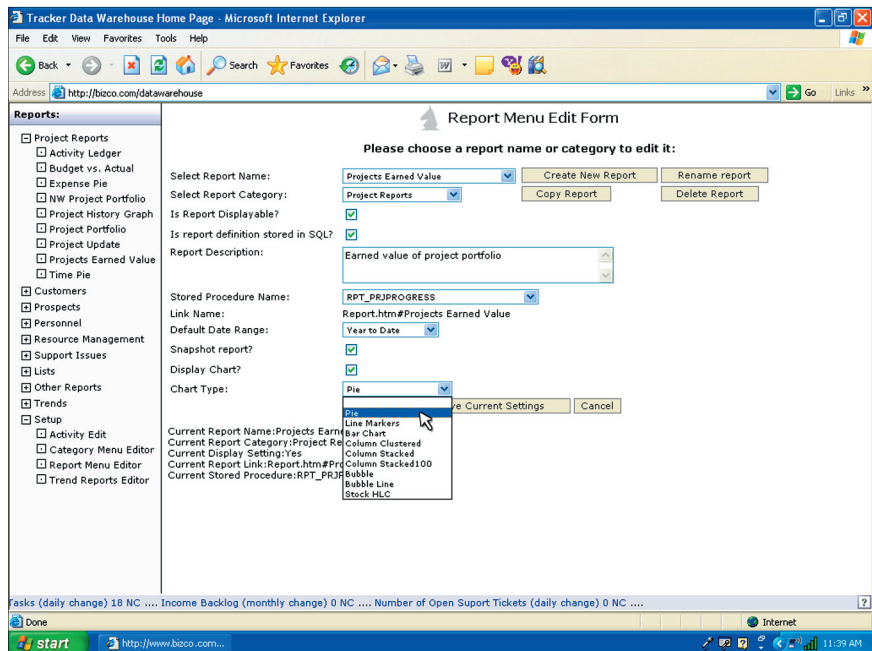
Historically, the State of Louisiana Legislative Auditor's paper-based audit process involved new audit documents being shuffled among departments in an approval process that could take from 20 to 30 days to complete, all before any real work could take place. With its electronic document workflow, Tracker Suite helped them complete 2 entirely paperless audits.

Tracker Suite also improved the efficiency of their security model. Previously this was a 2 step process, when a new audit was initiated, a single directory for the audit files was created and access to it was individually set for each auditor on that project. Using Tracker Suite, when a new audit project is created the creator is automatically granted access to that project folder, and can easily assign team members with access as well. ❖

Creating Business Intelligence Reports with the Tracker Data Warehouse

In addition to its existing report templates, the Tracker Data Warehouse also provides a means for users to create and configure their own reports, suited to their particular needs. Users can create their own SQL Stored Procedures and use the Report Menu Editor to build an entirely new report, even using data stored in user-created custom tables.

First, you have to ensure you have enough access to your company's SQL server to create a new Stored Procedure. Creating a new SQL Stored Procedure from scratch is a fairly complicated process, beyond the scope of this article. A much simpler method is simply to identify an existing report which contains the values you need, and copy it. This is the method used in this tutorial.



The Data Warehouse Report Menu Editor

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Using the Report Editor

The Report Editor can be selected under the 'Setup' category:

1. Expand the Setup category
2. Select "Report menu editor"
3. Select the Report Category
4. Check the box "Is Report Displayable" – this means the report can be displayed in a category
5. Check the box "Is report definition stored in SQL" – this means the report's definition is stored in the SQL server
6. Select from the correct Stored Procedure from the "Stored Procedure Name" pulldown list. This determines what stored procedure will be used to populate the report with data
7. Select the "Default Date Range"
8. Select whether the report will be displayed as a chart, and if so, select the type
9. Hit the "Create New Report" button.
10. Enter then name of the desired report when prompted and press OK

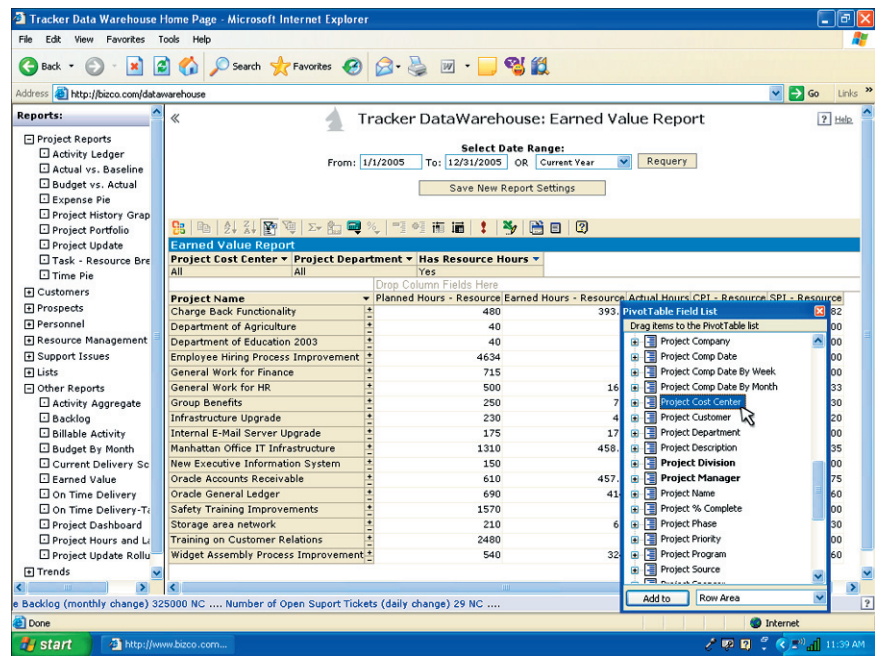
The new report will automatically be added to the category you chose above.

Adding Fields

1. Open the field list (icon marked in picture)
2. Find the desired field in the list
3. Either select the field and drag and drop it onto the Pivot Table in the location you desire or select the desired field then select the desired location from the "Add To" list at the bottom of the Field list selection dialog window

Deleting Fields

1. Select the field you wish to delete
2. Either hold the left mouse key



Earned Value Report

down with the field selected and drag the field off of the Pivot Table until a red X is displayed, or right mouse click and select "Remove Field" from the menu options provided

Creating Totals

You can create a "Total" at least two different ways. The first way is to create a total is by creating an underlying detail field and then displaying the total of the details. This method allows you to drill down through the last member of the Row Area and see all of the individual entries, which comprise the total.

1. Open the field list
2. Select the field that comprises the detail data
3. Select "Detail Data" from the "Add To" list at the bottom of the field list dialog window
4. Hit the X in the upper right hand corner of the Field list dialog window to close the Field list
5. Select the newly created field in the Pivot Table and right click
6. Select the "Autocalc" menu option

7. Select how you wish to total the field (options are "min", "max", "sum", "count")

An alternate method of creating a total does not rely on the creation of the underlying details.

1. Open the Field List by clicking its icon in the toolbar (circled in the screenshot above)
2. Select the field that comprises the data to be totaled
3. Select "Data Area" from the "Add To" list at the bottom of the field list dialog window

This creates a "sum" total by default if the field selected is numeric, and a "count" total by default if the field selected is not numeric. If you wish to change how the field is totaled, select the field, right click on the field, select "Property Toolbox", expand the "Total function" area, and select the appropriate totaling function. ❖