

# LEVERAGE

The Newsletter of Tracker Suite® and TrackerOffice®

Volume 3

## Tracker Suite 7.1 Released

*Offers powerful XML capabilities and new features, including configurable UI*








**Tracker Suite 7.1**, the latest release of Automation Centre's Lotus Notes enterprise management system (web site: [www.TrackerSuite.com](http://www.TrackerSuite.com)), debuted at Lotusphere 2006.

Tracker Suite 7.1 offers major improvements in workflow through XML forms, more integration with WebSphere, a cleaner user interface and new features for most of the various modules. A free trial CD may be ordered at:

[www.TrackerSuite.com/RFI](http://www.TrackerSuite.com/RFI)

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## 12 Years of Product Success!

|             |  |   |
|-------------|--|---|
| <b>1994</b> | <b>Time Tracker 1.0</b><br>Your Best Move for GroupWare Solutions!                                       |    |
| <b>1997</b> | <b>Tracker Suite 4.6</b><br>Include Project, Time, Expense and Purchasing<br>First Lotusphere appearance |   |
| <b>1999</b> | Lotus411 People's Choice Winner!<br>Tracker Suite 5<br>Ready for the Web                                 |   |
| <b>2000</b> | TrackerOffice Released!  |    |
| <b>2001</b> | Tracker Suite 5.2<br>DataWarehouse Released<br>Bizco Demo  |   |
| <b>2003</b> | Tracker Suite 6<br>Tracker Suite Goes XML  |     |
| <b>2005</b> | Tracker Suite 7<br>Outward facing Projects, Help Desk & CRM  |   |
| <b>2006</b> | <b>Tracker Suite 7.1</b><br>XML Forms & Framework<br>Response Doc Structure                              |    |

## Tracker Suite 7.1 Wins Best Business Process Solution Award from Lotus Advisor

*Enterprise scope and WebSphere integration make Tracker Suite a winner*



Tracker Suite is the winner of the 2006 Lotus Advisor Editor's Choice Award for Business Process Solutions.

Lotus Advisor magazine's panel of industry experts were at Lotusphere searching for useful and innovative products to help Lotus developers,

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## Upcoming events

### Delivering Project Excellence Conference

June 5 - 7  
Scottsdale, AZ  
[www.DeliveringProjectExcellence.com](http://www.DeliveringProjectExcellence.com)

### PMI 2006

October 21 - 24  
Seattle, WA  
[www.PMI.org](http://www.PMI.org)



435 East 9th Street  
Tucson, AZ 85705  
(520) 882 - 9287

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## Tracker 7.1 Release

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The new features of Tracker Suite 7.1 include:

### General upgrades

Tracker Suite 7.1 includes new XML views and the ability to resize and sort columns on all XML forms.

### Time Tracker

- Now links to vacation calendar
- Time cards deemed deficient after processing can be unprocessed / reprocessed.
- New billable feature: editable / non editable shaded lines
- Reminders for specific time sheet
- Improved searching by project cost center and project manager
- Optional editing of billable column
- Billable hours and ETC Totals
- New daily reminders

### Purchase Tracker

The screenshot shows an email titled 'Carlos Computer/demo' with a subject of 'Project Status'. The email body contains a table with the following data:

| Project Name                     | Manager         | Start Date | Due Date   | Comp | On Scope | Staff  | Timeline | Budget | Issues | Risks |
|----------------------------------|-----------------|------------|------------|------|----------|--------|----------|--------|--------|-------|
| Equities PMO                     | Mark Manager    | 10/08/2004 | 05/27/2005 | 30%  | Yellow   | Red    | Green    | Green  | Green  | Green |
| Office 2000 Corporate Deployment | Mark Manager    | 01/03/2005 | 08/31/2005 | 70%  | Red      | Green  | Green    | Green  | Red    | Green |
| Workforce Management             | Mark Manager    | 01/07/2005 | 04/29/2005 | 20%  | Green    | Yellow | Red      | Green  | Green  | Green |
| General Oracle Report Design     | Joe User        | 05/10/2005 | 12/30/2005 | 0%   | Green    | Green  | Green    | Green  | Green  | Green |
| AMAT                             | Carlos Computer | 04/29/2005 | 07/28/2005 | 0%   | Green    | Red    | Red      | Green  | Green  | Green |
| New Executive Information System | Carlos Computer | 01/07/2005 | 03/31/2005 | 30%  | Green    | Green  | Green    | Red    | Green  | Green |
| Oracle Accounts Receivable       | Carlos Computer | 07/28/2005 | 12/08/2005 | 75%  | Green    | Green  | Green    | Green  | Green  | Green |
| Oracle Server Upgrade            | Carlos Computer | 09/14/2005 | 10/28/2005 | 80%  | Yellow   | Green  | Red      | Green  | Green  | Red   |

Managers enjoy the ability to email the status of their project portfolio in Tracker Suite

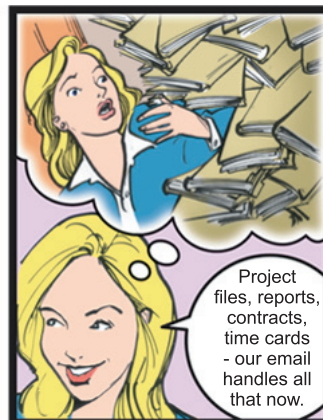
- Supports partial payments to vendor
- Automatic generation of PO numbers
- Cost centers / account codes controlled based on workflows or employee
- Upgraded administration functions for resend, rerouting, disapproval and archiving
- Tax and freight now distribute to each line item in reports
- Copy Button – Allows copying the data from an existing purchase request

### Expense Tracker

- Employee ID now in Header
- Warning and extra approval if daily limit is exceeded

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## Adventures in the Paperwork Jungle



*Lotus Advisor Award*  
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administrators, and users perform their jobs more easily and efficiently.

After evaluating many outstanding products, they selected their favorites for the Editors' Choice award.

Tracker Suite 7.1 was the winner of the Business Process: Solutions category.

### Simplifying Your Business

Tracker Suite was chosen because of its modular approach for enterprise management, as well as its ability to integrate with WebSphere.

*“The Award recognizes and celebrates strong tools and products for Lotus application architects, developers, and administrators.”*

*- John Hawkins  
Editorial Director  
Lotus Advisor Magazine*

“The editors of Lotus Advisor Magazine are pleased to acknowledge the notable achievement of Automation Centre with a 2006 Lotus Advisor Editors' Choice Award for its innovative product, Automation Centre Tracker Suite,” said John Hawkins, Editorial Director, Lotus Advisor Magazine. “The Award recognizes and celebrates strong tools and products for

Lotus application architects, developers, and administrators.”

Steven Birchfield was pleased with the win.

“It's great to start a Monday with a winner's notification for a contest, particularly from an established industry presence such as Lotus Advisor magazine,” Mr. Birchfield said.

### A Winning Record

Automation Centre's Tracker Suite was also a finalist in the 2002 Lotus Advisor Reader's Choice Awards. Tracker Suite has gathered other awards from

the Lotus Notes community, including consecutive wins of the ePro Magazine Apex Award for both 2003 & 2004. ❖

### Lotus Notes Factoid

The original concept which led to the development of Lotus Notes / Domino was a mainframe solution developed over 33 years ago.

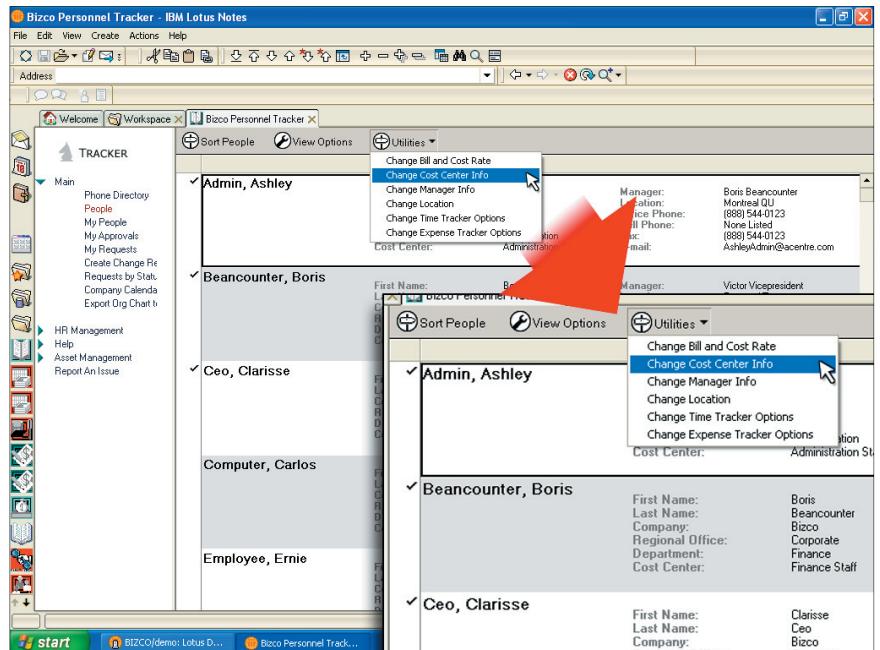


PLATO Notes, released by the Computer-based Education Research Laboratory (CERL) in 1973, was used to tag a bug report with the user's ID and the date and to make the file secure so that other users couldn't delete it.

## Tracker Tip

*What is the easiest way to change cost center codes for a large group of employees?*

Use the “Utilities” button in Personnel Tracker. Select the personnel you wish to update, click the Utilities button, and select the change you would like to make, whether that is updating cost centers, changing billing, time or expense report settings, locations or more. ❖



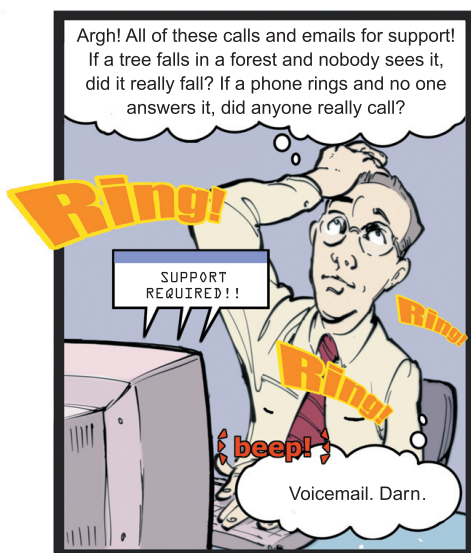
# How to Improve Your Help Desk Services

## Get more out of Support Tracker

Support Tracker offers a comprehensive means of managing your help desk services with its automatic routing of support tickets, escalation and reporting functions. But are you leveraging all of those abilities? Here are 6 ways you can ensure your help desk services are running as efficiently as possible.

### “You’ve Got Mail!”

Streamline your reporting process with email addresses configured for Support Tracker, which can route incoming emails into support queues. Using our Bizco cast as an example, if Joe User was experiencing a spotty network connection while working remotely, he would email his problem to [networkproblem@Bizco.com](mailto:networkproblem@Bizco.com).



| Category               | Jan        |               |              | Feb      |            |               |         |       |    |    |       |    |       |
|------------------------|------------|---------------|--------------|----------|------------|---------------|---------|-------|----|----|-------|----|-------|
|                        | Open BOM % | New Tickets % | Closed/Esc % | Open EOM | Open BOM % | New Tickets % | Closed/ |       |    |    |       |    |       |
| Customer Support       | 40         | 66.6%         | 75           | 68.2%    | 15         | 25.9%         | 12      | 19.4% | 25 | 28 | 30.4% | 22 | 29.3% |
| Data Warehouse         | 5          | 8.4%          | 10           | 9.1%     | 30         | 51.7%         | 18      | 29%   | 28 | 31 | 33.7% | 11 | 14.7% |
| Internal IT and Phones | 10         | 16.6%         | 15           | 13.6%    | 5          | 8.6%          | 11      | 17.7% | 11 | 15 | 16.3% | 19 | 25.3% |
| Pre Sales              | 5          | 8.4%          | 10           | 9.1%     | 8          | 13.8%         | 21      | 33.9% | 21 | 18 | 19.6% | 23 | 30.6% |
| Grand Total            | 60         | 100%          | 110          | 100%     | 58         | 100%          | 62      | 100%  | 62 | 92 | 100%  | 75 | 100%  |

Open / Closed / Escalated Ticket Reports

The email would automatically be created as a ticket in the network support queue.

### Copy It

One of the new features of Support Tracker is the ability to paste emails directly into tickets, as tickets themselves and as responses to ticket emails. In Support Tracker 7.1, all materials are response documents, creating a highly flexible and efficient work environment.

For example, right click and copy an email from the flat view of your Inbox. Open Support Tracker and in the ticket view, right-click and paste. A dialog box will appear, asking whether to create a new ticket from the email, to paste the email as a response document, or as a simple paste.

If you create a new ticket from the email, a new ticket will ap-

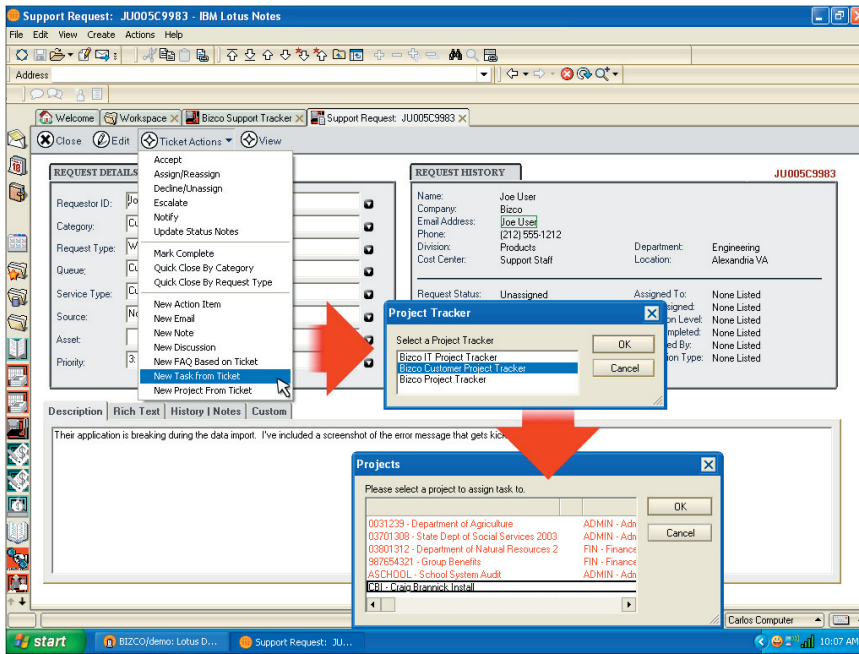
pear – the subject and body of the email populating the ticket content.

If you paste it as a response to a ticket, the email attaches to that ticket. In addition, the pasted email will join a doclink thread that is accessible from within the ticket or from the other filed messages.

### Keep It Together...

Organize and track your efforts. Instead of backtracking through your emails for messages, To Do lists for action items, or personal notes for phone calls and discussions about a ticket, keep it all in Support Tracker. Select the ticket in question and select Ticket Actions, and from the dialog box that opens, choose from action items, discussions, emails, notes or tasks. Any item created this way is attached to

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Converting Support Tickets to Tasks

the wheel and creating a project for it, simply select it, and select *Ticket Actions* -> *New Project from Ticket*. A dialog box will appear with the available project repositories to create the project in. After selecting the repository, a new project will be created, its type and objective based on the ticket's request type and information. The content of the ticket will be filed within the project definition, along with a doclink to the originating ticket in Support Tracker. The originating ticket is automatically closed and marked "Turned into Project".

Similarly, if a support ticket is identified as a project task, select *Ticket Actions* -> *New Task from Ticket*. In the dialog boxes which follow, select the project repository and project to create the task for. Once created, the

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*Improve Your Help Desk*  
continued from pg. 4

the ticket.

**... and Keep It Moving**

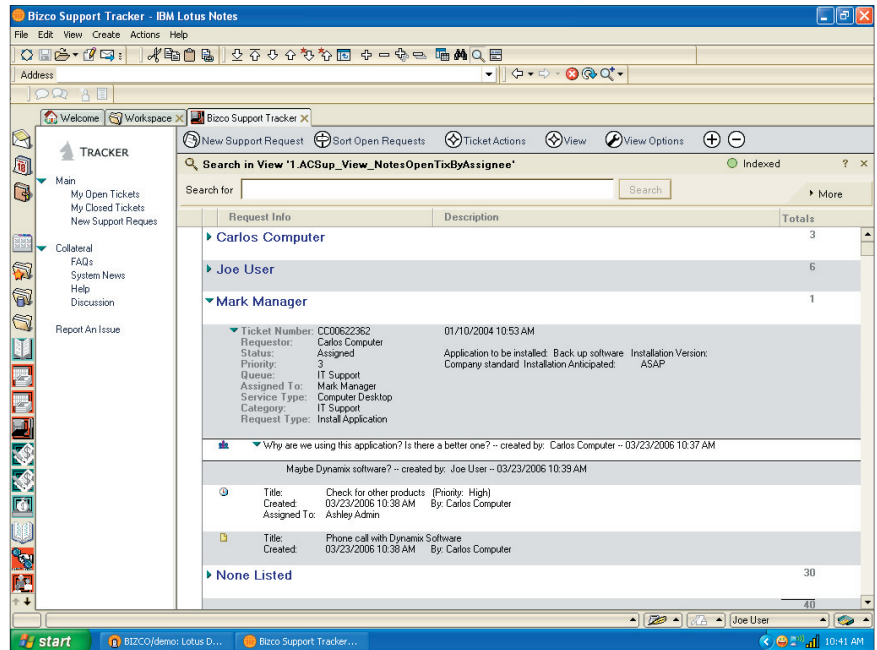
Configure Service Level Agreements and Request Type profiles to ensure that incoming tickets are sent to the right department, that notifications are sent to the right people, and that there is a defined escalation - action structure for issues.

Utilize the Average Closure Times, Overdue Responses and Overdue Tickets views to identify and correct problem areas in your support services.

In addition to the views available in Support Tracker, the Tracker Data Warehouse provides a variety of reports such as support ticket pies. It also offers a report editor to create new, customized help desk reports as needed.

**Work Smarter – Unify your Projects and Help Desk**

If you have a ticket which is identified as a worthwhile project, instead of reinventing



Nested Response Documents in Support Tracker

## Tracker 7.1 Release

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- Highlighted exception rows
- File attachments with reports
- Negative amounts allowed

### Project Tracker

- Create a new status report based on the last saved report
- Projects can be unarchived more easily
- Supports multiple budgets and budget periods
- Check-in / check-out and versioning on documents
- Completion date for Project Logs
- Improved notifications to project staff
- New "Pick Button" for Org Structure
- Labels for custom fields
- Outward Collaboration Interface
- Project team members receive "Welcome to Project" email
- Can copy an entire project into a new project
- More integration with Microsoft Project: export entire list of resources, view available free time on tasks, ability to log fixed price line items and more

### Support Tracker

- Follow up dates
- Threaded views
- Paste emails into support tickets
- Email from Support Tracker
- Ticket aging
- Open, Closed, Escalated

| Project Department           | Project Name | New       | Pending   | Complete  | # of Projects | % of Total  | Total Hours | % of Total  |
|------------------------------|--------------|-----------|-----------|-----------|---------------|-------------|-------------|-------------|
| Admin - Administration       |              | 8         | 5         | 1         | 5             | 6.3%        | 250         | 13%         |
| Mark - Marketing             |              | 10        | 15        | 2         | 15            | 18.5%       | 740         | 38.3%       |
| R&D - Research & Development |              | 15        | 25        | 4         | 26            | 32%         | 230         | 11.9%       |
| Sales - Sales                |              | 5         | 13        | 2         | 13            | 16%         | 400         | 20.7%       |
| Serv - Technical Support     |              | 10        | 21        | 3         | 22            | 27.2%       | 310         | 16.1%       |
| <b>Grand Total</b>           |              | <b>48</b> | <b>79</b> | <b>12</b> | <b>81</b>     | <b>100%</b> | <b>1930</b> | <b>100%</b> |

New and Completed Project Reports

- Create new projects and project tasks from tickets
- Integration with Customer Tracker and integration with workflow roles
- Salary Export to Excel (Encrypted fields) ❖

### Data Warehouse

- Improved Help editor
- Other Reports Section
- Budget Hours and Actual Hours on Task List
- New Asset List report
- Resource Portfolio Reports
- Invoicing prep and invoicing
- Faster Activity Ledger

### HR

- HR Change Request from HR
- Vacation Outline in Time Tracker
- Export org chart to Visio
- Export phone list to Excel
- Account codes
- Vacation Request for others
- Archive and re-activate from terminations view

### Improve Your Help Desk

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task is populated with information from the ticket, with a doclink to the originating ticket created. The originating ticket is closed and marked "Turned into Task".

### Leverage Your Success

Transform the information from your successfully closed support tickets into knowledge the entire organization can use. Select a ticket that appears to be common or potentially recurring and from the Action Bar at the top of the Portal window, select *Ticket Actions -> Convert to FAQ*. This will paste the ticket in a Web accessible FAQ for future reference by all users. ❖



# Extra!

## New Product: Asset Tracker

In response to customer demand, Automation Centre has created a new asset management module, entitled Asset Tracker.

One of the new tools included in Asset Tracker is the Survey function. With the click of a button, managers can email a Survey form to all the users in their organization. When the email is opened by the recipient, the Survey automatically detects all of the applications on the recipient's computer and populates itself. The recipient also reports the other various assets in their possession, from security codes to Blackberry® devices, furniture to IP addresses. Once returned, the Survey items reported are automatically input into Asset Tracker. The Survey feature helps organizations to quickly begin cataloging the numerous unidentified, untracked and often expensive assets that have accumulated over the course of time.

*The Asset Tracker Survey*

Other management and tracking functions offered by Asset Tracker include:

- Depreciation tracking
- Functions for asset deployment and collection
- Integration with Purchase Tracker for a streamlined and secure transitioning of received purchases into the asset pool
- Integration with Personnel Tracker for simplified employee provisioning upon hire, as well as collection upon employee departure.
- Integration with Support Tracker to better manage help desk services