

Leverage

Tracker and ITIL

How Organizations Can Leverage Tracker Suite to Implement ITIL

The Information Technology Infrastructure Library (ITIL) is a framework of best practice approaches that leads to the improvement of IT services both in quality and faster delivery. ITIL sets forth management procedures that are supplier independent and provide guidelines for the development and operation of IT infrastructures.

Proctor & Gamble installed an ITIL framework in the late 1990's, **and realized a savings of \$500,000,000 within 4 years.** Martin Cohen, then manager of global service management at Procter & Gamble, said "It all comes down to the fact that IT is an integral part of supporting the business. When IT processes are done by 5,000 people consistently across one company, service management can deliver tremendous savings." ("Reaping the Rewards of Best Practices", Denise Dubie, Network World 9/30/02).

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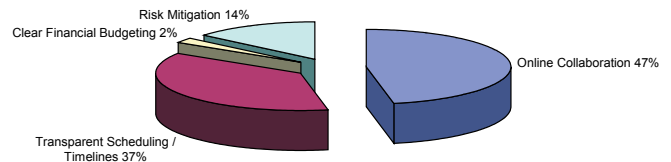
Winning the Collaboration Game

Are you getting the most out of Tracker Suite?

A poll of project managers by PM Network magazine revealed that the single most important network feature in their project management communication system was their ability to collaborate online.

Tracker Suite provides one of the strongest communication and collaboration platforms in the industry, by building upon the existing messaging infrastructure of the organization. **Here are 5 ways you can make sure your organization is taking advantage of everything Tracker Suite offers.**

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PMI Network Magazine
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Winning

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1) Leveraging To-Do's and Calendars

When assigning tasks, as well as sending an automatic notification of the assignment, managers can also add that task to the assignee's To-Do list, ensuring that the task stays in front of them.

In the same manner, when scheduling meetings, the meeting chairman can add the meeting to the invitees' Calendars when sending out invitations.

2) On-the-fly Newsletters

By leveraging the "Copy Selected as Table" function, managers can quickly and easily build on-the-fly email newsletters based on views. In 2 clicks, managers can create a newsletter on any subject that Tracker Suite offers a view of (or a view that the manager creates): project portfolio status, sales activities, support ticket closures and more. With Tracker Suite 7.1, any color-coding in the view is sustained in the email.

Our Tracker Tip (page 3) describes how to build one of these newsletters.

3) Filing Emails in Tracker Suite

Store important emails within the project folder for secure, accessible reference by the project team. For example, if a customer emails in a request for a

scope change, roll it into the project folder by right-clicking and copying the email from the InBox view, then open Project Tracker. Click **Edit -> Paste** from the Menu Bar (or simply **Ctrl+V** from the keyboard), select the project to file the email in and what category to file it under.

4) Automate Reporting

Quit chasing your project teams around for their status reports, utilize Tracker Suite's automated status report reminders. Go to the Project Definition document and assign reporting responsibilities and timelines- are status reports required on a weekly, bimonthly, or monthly basis?

Also, make sure the agent that runs the automated checks is set to run within that time frame. If you want weekly reports, and the agent is only set to run once a month, your automated reminders won't be issued often enough.

5) Project Forums

Project Tracker offers a general discussion area for project databases, but managers can also seed project-specific discussion trees within a project itself by selecting the project definition and clicking **New -> Discussion Topic** from the Action bar. Choose a format for the discussion (Survey, Announcement, Suggestion, Discussion or other) and check "Notify of responses" to be alerted to discussion responses, as well as responses to responses. 📧

ADVENTURES

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Tracker Tip: Use Your Views

Improve collaboration with on-the-fly newsletters and more

My project team is behind on their tasks

I need to warn my managers that we are wandering off-schedule!

Our open ticket count is climbing, and some of them exceed our SLA!

For managers seeking to align their teams with goals, newsletters are a fast, effective tool. By putting detailed information right in the hands of the team members, newsletters communicate status and urgency more effectively than a simple call to action. But assembling an effective newsletter can take time, often more time than a busy manager can spare.

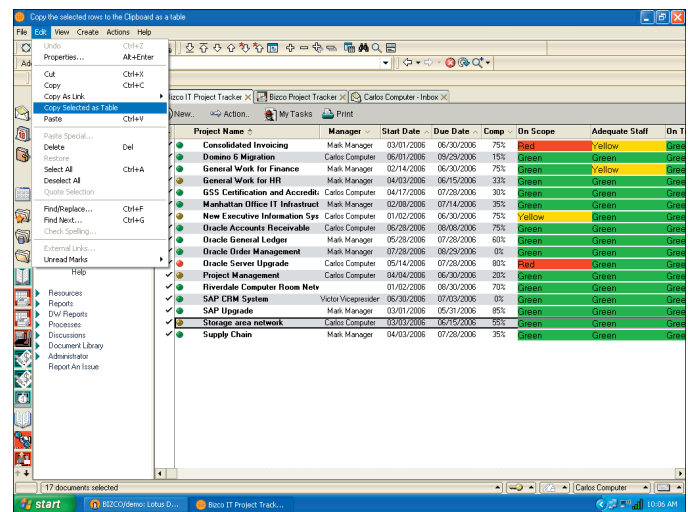
Tracker Suite, which offers a function for copying views into tables (with color-coding support in Tracker Suite 7.1) provides managers a means of building effective newsletters with as few as two clicks. As shown in the example on the right, a project dashboard view with colored status indicators is sustained when copied to email.

To assemble the newsletter:

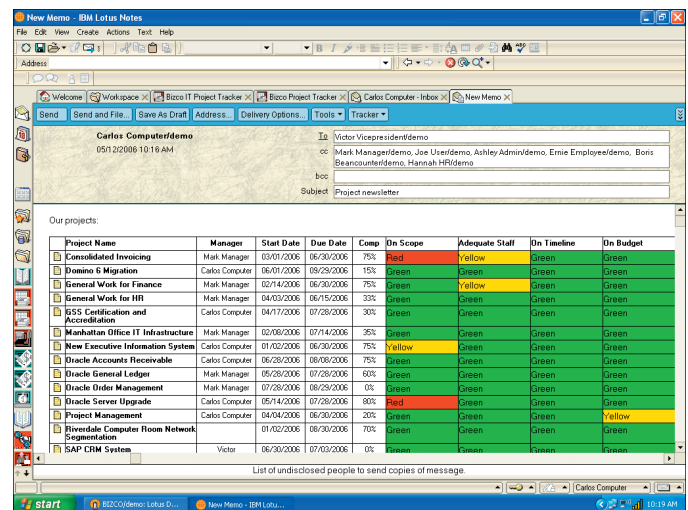
1. Go to the view you wish to copy from.
2. Select the records you would like to copy, then from the Menu bar, click **Edit->Copy Selected as Table**.
3. Open a new email, addressed to the interested recipients. Right click and paste the table into the email.

Voila! Your newsletter is complete. Each row of the table includes a doclink, which the recipients can click to open that particular record for more information. Add your notes, select the recipients, and send it on its way.

You are not limited to Notes email with this feature. You can paste tables into Word documents, simplifying report building. You can also paste the selected information into an Excel spreadsheet, saving yourself the trouble of exporting the selected as a Lotus 1-2-3 or CSV file, then opening the file in Excel. 📄



Project Name	Manager	Start Date	Due Date	Comp	On Scope	Adequate Staff	On Time
Consolidated Invoicing	Mark Manager	03/01/2006	06/30/2006	75%	Red	Green	Green
Domino S Migration	Carlos Computer	06/01/2006	09/29/2006	15%	Green	Green	Green
General Work for Finance	Mark Manager	02/14/2006	06/30/2006	75%	Green	Yellow	Green
General Work for HR	Mark Manager	04/03/2006	06/15/2006	33%	Green	Green	Green
GSS Certification and Accredite	Carlos Computer	04/17/2006	07/29/2006	30%	Green	Green	Green
Manhattan Office IT Infrastructure	Mark Manager	02/09/2006	07/14/2006	35%	Green	Green	Green
New Executive Information Sys	Carlos Computer	01/02/2006	06/30/2006	75%	Yellow	Green	Green
Oracle Accounts Receivable	Carlos Computer	06/28/2006	08/08/2006	75%	Green	Green	Green
Oracle General Ledger	Mark Manager	05/28/2006	07/28/2006	60%	Green	Green	Green
Oracle Order Management	Mark Manager	07/29/2006	08/29/2006	0%	Green	Green	Green
Oracle Server Upgrade	Carlos Computer	05/14/2006	07/29/2006	80%	Red	Green	Green
Project Management	Carlos Computer	04/04/2006	06/30/2006	20%	Green	Green	Green
Riverdale Computer Room Netw	Victor Vicepresidentidemo	01/02/2006	06/30/2006	70%	Green	Green	Green
SAP CRM System	Victor Vicepresidentidemo	06/30/2006	07/03/2006	0%	Green	Green	Green
SAP Upgrade	Mark Manager	03/01/2006	05/31/2006	85%	Green	Green	Green
Storage area network	Carlos Computer	03/07/2006	06/15/2006	55%	Green	Green	Green
Supply Chain	Mark Manager	04/03/2006	07/29/2006	35%	Green	Green	Green



Carlos Computer/demo
05/11/2006 10:18 AM

To: Victor Vicepresidentidemo
cc: Mark Manager/demo, Joe User/demo, Ashley Admin/demo, Ernie Employee/demo, Boris Beancounter/demo, Hannah HR/demo
bcc: bob
Subject: Project newsletter

Our projects:

Project Name	Manager	Start Date	Due Date	Comp	On Scope	Adequate Staff	On Time	On Budget
Consolidated Invoicing	Mark Manager	03/01/2006	06/30/2006	75%	Red	Yellow	Green	Green
Domino S Migration	Carlos Computer	06/01/2006	09/29/2006	15%	Green	Green	Green	Green
General Work for Finance	Mark Manager	02/14/2006	06/30/2006	75%	Green	Yellow	Green	Green
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GSS Certification and Accreditation	Carlos Computer	04/17/2006	07/29/2006	30%	Green	Green	Green	Green
Manhattan Office IT Infrastructure	Mark Manager	02/09/2006	07/14/2006	35%	Green	Green	Green	Green
New Executive Information System	Carlos Computer	01/02/2006	06/30/2006	75%	Yellow	Green	Green	Green
Oracle Accounts Receivable	Carlos Computer	06/28/2006	08/08/2006	75%	Green	Green	Green	Green
Oracle General Ledger	Mark Manager	05/28/2006	07/28/2006	60%	Green	Green	Green	Green
Oracle Order Management	Mark Manager	07/29/2006	08/29/2006	0%	Green	Green	Green	Green
Oracle Server Upgrade	Carlos Computer	05/14/2006	07/29/2006	80%	Red	Green	Green	Green
Project Management	Carlos Computer	04/04/2006	06/30/2006	20%	Green	Green	Green	Yellow
Riverdale Computer Room Network Segmentation	Carlos Computer	01/02/2006	06/30/2006	70%	Green	Green	Green	Green
SAP CRM System	Victor	06/30/2006	07/03/2006	0%	Green	Green	Green	Green



For more information about Tracker Suite, including feature sheets, process maps and Flash demos, visit www.TrackerSuite.com

Tracker and ITIL

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But like any organizational implementation, ITIL can be difficult to integrate into the existing organizational processes and infrastructure, particularly for organizations with disparate systems.

Using Tracker Suite for ITIL

Tracker Suite offers organizations a painless means of leveraging a core component of their IT infrastructure, their Lotus Notes / Domino messaging system, to structure the procedures outlined by ITIL.

There are eight ITIL disciplines.

- **Service Support**
- **Service Delivery**
- **Planning to Implement Service Management**
- **Security Management**
- **ICT Infrastructure Management**
- **The Business Perspective**
- **Application Management**
- **Small Scale Implementation**

The structured project and support environment of Tracker Suite can be leveraged across all of these disciplines. However, this article will focus on the three where Tracker Suite makes the most impact: Service Support, Service Delivery and Application Management.

Service Support

The Service Support ITIL discipline focuses on ensuring that users have access to the services they need to work effectively, and are not inhibited by broken operations caused by failures or change, poorly planned releases of new IT technology or inadequate provisioning.

This requires:

A *Service Desk* - An accessible means to support

Web Help Desk

services.

Incident Management - A process to restore a broken operation.

Problem Management - A process to solve an incident, and reduce or eliminate its reoccurrence.

Configuration Management - A procedure for managing and tracking assets, both hardware and software.

Release Management - A procedure similar to Configuration Management, but focusing on automated distribution of software and hardware, including license controls across the entire IT infrastructure.

Change Management - Standardized methods and procedures for efficient and prompt handling of all changes, in order to minimize the impact of

change-related incidents upon service quality, and consequently improve the day-to-day operations of the organization.

Improving IT Communication

Tracker Suite's Support Tracker provides a Web Portal where users can check system news and review FAQs whenever they need to, as well as submit support tickets. Support tickets can also be submitted by email to specific addresses configured by the IT department (for example,



“I may have invented it, but Bill [Gates] made it famous...”

David Bradley, creator of the reboot code “CTRL + Alt + Delete”

bugs@aBusiness.com). Support Tracker allows an unlimited number of configured addresses. Emails received at these addresses are automatically converted to tickets and placed in a designated queue.

Automating Processes

Submitted tickets are automatically routed based on request type and Service Level Agreements, ensuring they are dealt with appropriately and enabling IT departments to meet their obligations and manage incidents.

Asset Provisioning and Tracking

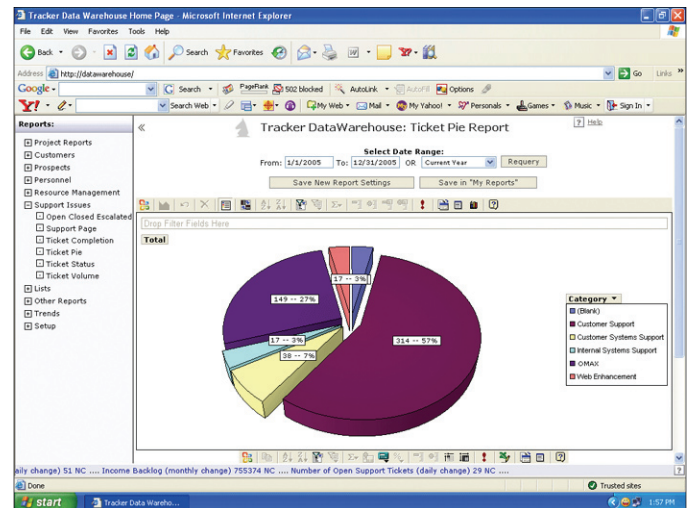
Tracker Suite's new Asset Tracker module manages the tracking, provisioning and collection of assets. Asset Tracker also integrates with Support Tracker, so that an issue history of the asset can be maintained. It also offers a Survey function, allowing IT departments to quickly canvas every desktop on the organization for installed software, facilitating licensing compliance efforts.

Managing Change

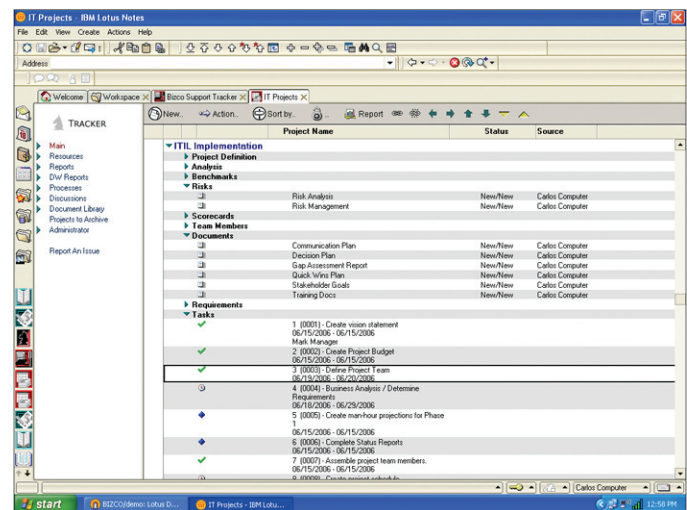
Project Tracker's WBS templates and process tollgates can be utilized for the orderly management of change and releases, minimizing their impact on users.

Service Delivery

The Service Delivery discipline is concerned with monitoring the performance of the services delivered by the organization, ensuring that SLAs are met, that business users are receiving



Ticket Pies



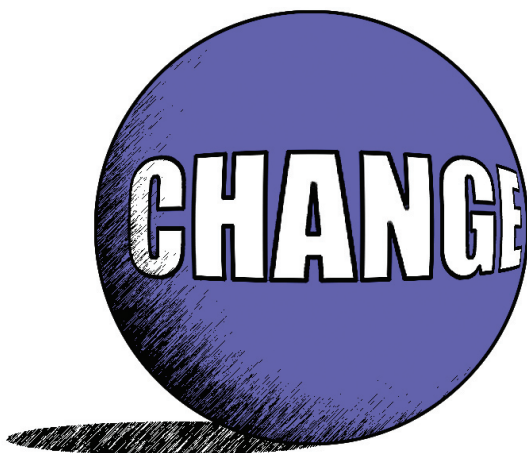
ITIL Implementation Project

satisfactory support and that customer projects are being delivered on time and on budget.

Tracking Project and Help Desk Performance

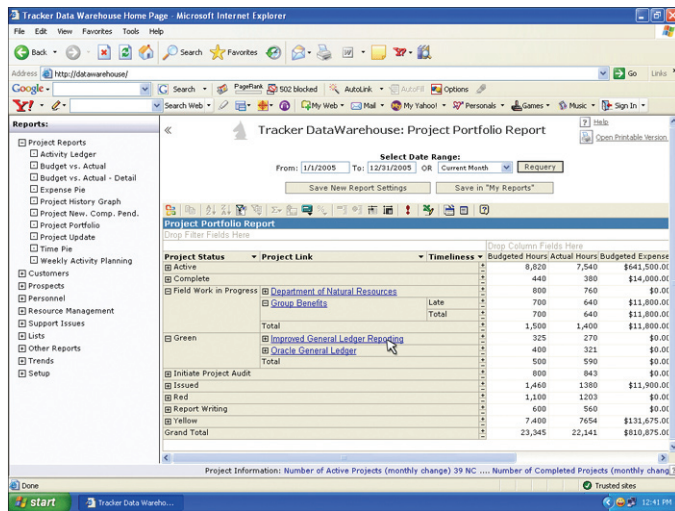
The Tracker Data Warehouse generates reports based on data gathered from the Tracker Suite modules as well as legacy databases, to generate a wide array of reports which IT departments can use to benchmark and monitor their performance, including Allocation by Resource, Open/Closed/ Escalated Tickets, Ticket Trends, Project Earned Value, Employee Capacity and more.

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Tracker and ITIL

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Project Portfolio Dashboard

Application Management


ITIL Application Management set encompasses a set of best practices proposed to improve the overall quality of IT software development and support through the life-cycle of software development projects. Project Tracker's robust project management capabilities offer an excellent tools set for the development of projects. At a higher level, the IT portfolio management capabilities allow IT organizations to effectively manage multiple software development projects.

Summary

There are clear benefits to establishing ITIL disciplines: increased efficiencies and transparency, improved service and stability. However, the ITIL framework is also complex in its integration of project, support and reporting processes, and is a difficult endeavor particularly for larger organizations utilizing disparate systems to manage these processes.

Tracker Suite offers compelling advantages to organizations using Lotus Notes, which are seeking to establish an ITIL framework. By building on a core component of the existing infrastructure, Tracker Suite deploys easily across the enterprise. Furthermore, Tracker Suite unifies the major

processes of ITIL, projects, support and reporting within a single system.

For more about Tracker Suite and ITIL, please visit: www.TrackerSuite.com/PDF/TS_ITIL.pdf to download the full white paper. 



A project manager, a programmer and a hardware engineer discover a magic lamp and release the Genie inside. The Genie says, "Normally I grant 3 wishes, but because there are 3 of you, I will grant you each 1 wish apiece."

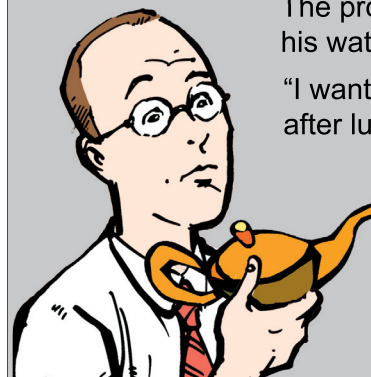
The hardware engineer is first. He says, "I want to spend the rest of my life living in a mansion, swimming in money and married to a the world's most beautiful woman!" The Genie claps his hands, and the man vanishes in a puff of smoke.

The programmer goes next. She says, "I want to spend the rest of my life on a boat, sailing the Mediterranean without a care in the world, married to the world's most handsome man!" The Genie claps his hands, and the woman vanishes in a puff of smoke.

Finally, the Genie turns to the project manager. "And what would *YOUR* wish be?" he asks.

The project manager checks his watch.

"I want both of them back after lunch."



Mitch Kapur, the founder of Lotus Development Corporation, chose the company name from the yoga pose *Padmasanam* - "The Lotus Posture"

ENWIN Chooses Tracker Suite

"We are very pleased with Tracker Suite's performance."

Increasingly, organizations are embracing methodologies such as ITIL, realizing the efficiency in unifying their project and support processes. For ENWIN Utilities Ltd., it was a necessity.

ENWIN Utilities Ltd. is a managed services company providing billing, credit, financial and customer service, as well as Help Desk support on behalf of ENWIN Utilities, ENWIN Powerlines, Windsor Utilities Commission, and MaXess Networx™.

ENWIN wanted to improve the workflow of their projects, time reporting and help desk services, all of which were handled by separate systems

ENWIN must comply with service level agreements with their affiliate service companies, and has to report the time spent working on tickets. The disparate systems made reporting a cumbersome process, as data had to be pulled from different spreadsheets and then compiled into reports.

ENWIN's specific objectives were improved document management, simpler time reporting, and better tracking and measurement of their project and help desk efforts.

To meet these objectives, ENWIN deployed Tracker Suite modules including Project Tracker (project management), Support Tracker (help desk), Time Tracker (time reporting) and Personnel Tracker (personnel management), as well as the Tracker Data Warehouse, a Web based reporting engine.

Improved Document Management

ENWIN's project and change documents were spread across the organization. ENWIN wanted to centralize these documents in a secure, but accessible location.

Project Tracker provides a central, searchable, Web accessible location for their documents. These documents are secured by read/write/delete privileges, and are protected by version control.

ENWIN leverages the document capabilities of Support Tracker as well. Emails, tasks, notes, discussions and action items are created within

Support Tracker and attached to the relevant ticket, simplifying organization and work tracking.

Simpler Time Reporting

While ENWIN's existing time reporting application worked well, it did not have the flexibility they wanted for their work. Users were unable to edit their hours once they were entered, which led to ENWIN employees maintaining a personal spreadsheet throughout the week, then re-reporting the data to the time reporting application.

With Time Tracker, ENWIN employees now create, store, update and submit their timesheets in a Web accessible InBox. They can easily assign time to projects, tasks, support tickets or cost centers using picklists.

Project and Help Desk Tracking

Prior to the implementation of Tracker Suite, the separation of the time reporting application from the project and support ticket databases made tracking the time spent in projects and support services difficult.

The Tracker Data Warehouse gathers data from the various Tracker Suite modules to generate reports which ENWIN can use to monitor their efforts and better communicate the value of their services to customers. The Data Warehouse generates reports including Ticket Pies, Closed Tickets, Time Pies and Project Earned Value.

Leveraging Notes for Lower TCO

Another reason ENWIN chose Tracker Suite was its utilization of their existing Lotus Notes / Domino platform. This resulted in a lower total cost of ownership for ENWIN, and also simplified training for their employees.

According to Marvin Routliffe, ENWIN's Director of Information Services & Technology, ENWIN's experience with Tracker Suite and its deployment has been positive, and that training went very rapidly.

"We are very pleased with Tracker Suite's performance." ■