

LEVERAGE

The Newsletter of Tracker Suite® and TrackerOffice®

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), 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

continued on pg. 2

12 Years of Product Success!

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

continued on pg. 3

Upcoming events

Delivering Project Excellence Conference

June 5 - 7
Scottsdale, AZ
www.DeliveringProjectExcellence.com

PMI 2006

October 21 - 24
Seattle, WA
www.PMI.org



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

continued on pg. 2

Tracker 7.1 Release

continued from pg. 1

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

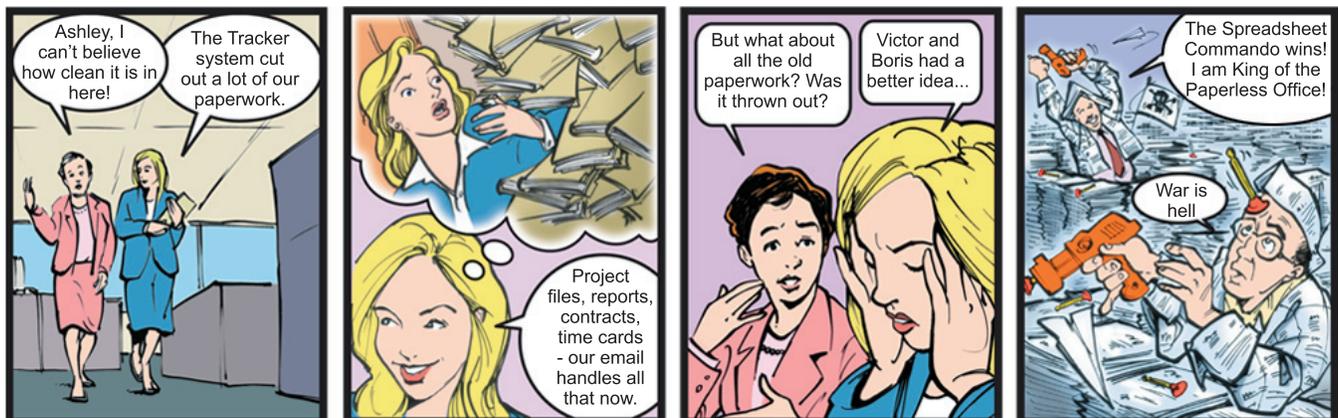
- Supports partial payments to vendor
- Automatic generation of PO numbers
- Cost centers / account codes controlled based on workflows or employee
- Upgraded administration functions for resend, rerouting, disapproval and archiving
- Tax and freight now distribute to each line item in reports
- Copy 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

continued on pg. 6

Adventures in the Paperwork Jungle



Lotus Advisor Award
continued from pg. 1

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.

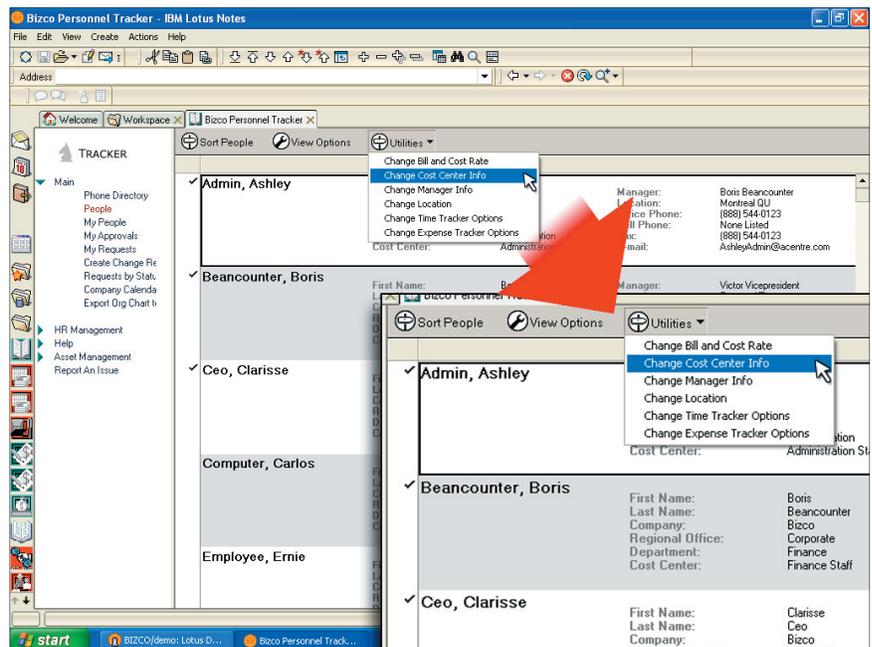


PLATO Notes, released by the Computer-based Education Research Laboratory (CERL) in 1973, was used to tag a bug report with the user's ID and the date and to make the file secure so that other users couldn't delete it.

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. ❖



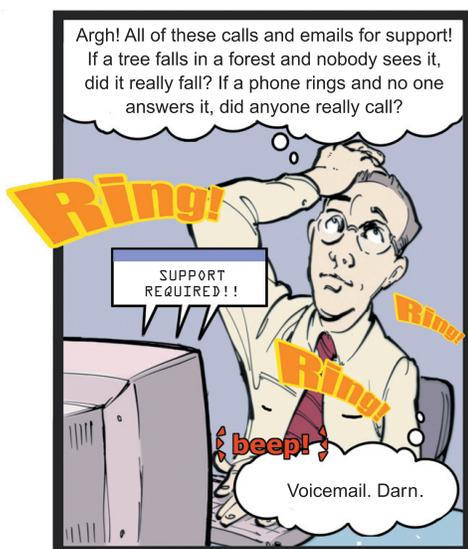
How to Improve Your Help Desk Services

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.



Tracker Data Warehouse Home Page - Microsoft Internet Explorer

Address: <http://datawarehouse/>

Tracker DataWarehouse: OCE 3 Report

Select Date Range: From: 1/1/2005 To: 3/28/2006 OR Last Month Requery

Save New Report Settings Save as HTML Report Save in "My Reports"

OCE 3 Report

Drop Filter Fields Here

Category	Jan			Feb		
	Open BOM %	New Tickets %	Closed/Esc %	Open BOM %	New Tickets %	Closed/
Customer Support	40	66.6%	75	68.2%	15	25.9%
Data Warehouse	5	8.4%	10	9.1%	30	51.7%
Internal IT and Phones	10	16.6%	15	13.6%	5	8.6%
Pre Sales	5	8.4%	10	9.1%	8	13.8%
Grand Total	60	100%	110	100%	58	100%

Number of Open Support Tickets (daily change) 54 NC ...

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-

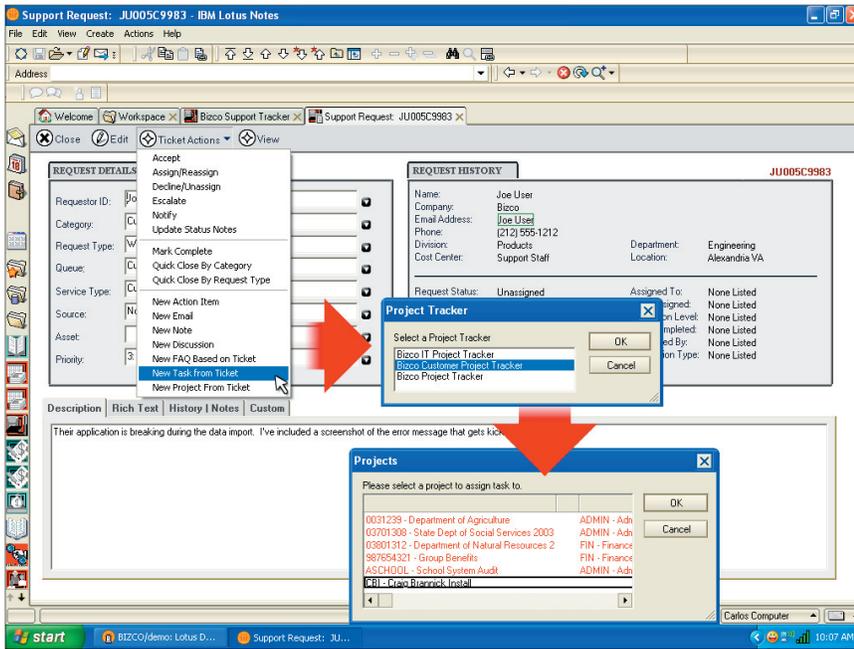
pear – the subject and body of the email populating the ticket content.

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

continued on pg. 5



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

continued on pg. 6

Improve Your Help Desk

continued from pg. 4

the ticket.

... and Keep It Moving

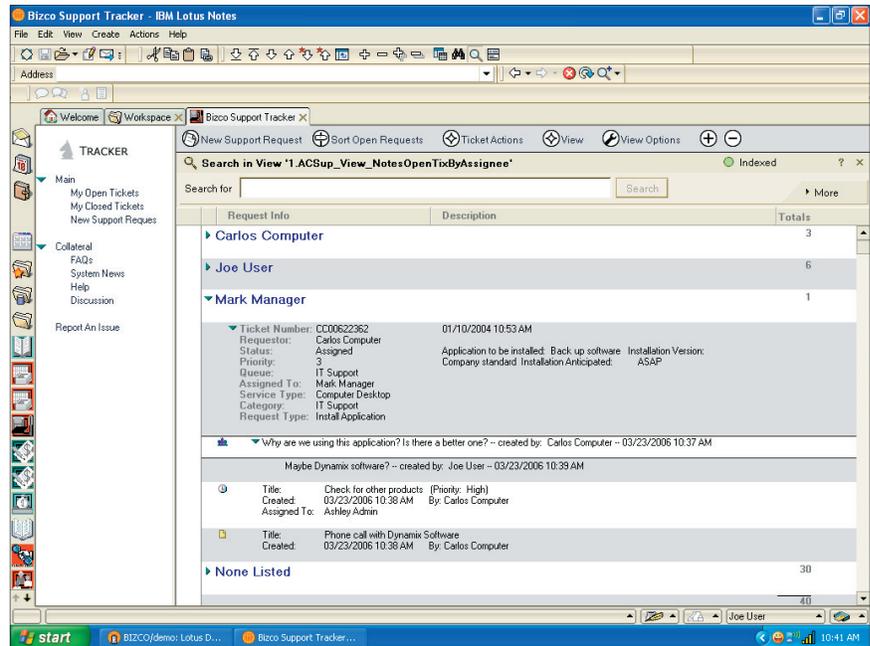
Configure Service Level Agreements and Request Type profiles to ensure that incoming tickets are sent to the right department, that notifications are sent to the right people, and that there is a defined escalation - action structure for issues.

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

continued from pg. 2

- 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%
Grand Total		48	79	12	81	100%	1930	100%

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

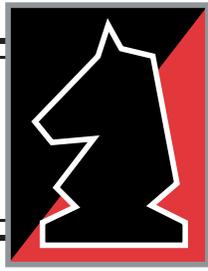
Improve Your Help Desk

continued from pg. 5

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.

Employee Information	
First Name:	Ernie
Last Name:	Employee
Employee ID:	
Cost Center Name:	Support Staff
Department Name:	Support
Division Name:	Products
Company Name:	Bizco
Location:	Tucson
Position:	Programmer
Office Phone (xxxx) 123-2345:	123.111.1111
Extension:	123
Fax Phone (xxxx) 123-2345:	
Optional: Published Cell Phone (xxxx) 123-2345:	

Fixed Asset Information	
<input checked="" type="checkbox"/> Blackberry	Model #: 2353267973
<input type="checkbox"/> Company Paid Cell Phone	Service Provider:
<input type="checkbox"/> Company Reimbursed Cell Phone	Service Provider:
<input type="checkbox"/> Extra Laptop Battery	
<input type="checkbox"/> Laptop Docking Station	

Other Asset Information	
<input type="checkbox"/> Business Cards	Provider:
<input type="checkbox"/> Conference Call Number	Phone Number:

Hardware Information	
This Client:	PC Laptop

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