Why ITEC Needed Project Management and Helpdesk

- Wanted all to be informed without being overwhelmed
  - People can focus on their specific tasks and issues
  - People can see everything going on in the project
  - Best of both worlds

- We needed:
  - A better way to work collaboratively
  - To easily see and change priorities
  - A better way to manage deadlines
  - Better reporting

- Last, but not least, we needed more Cow Bell!
A fully functional, web based, team oriented, whiz click, project management tool.

Functional without being ‘heavy’
Project Management

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What is AtTask?

@task allows you to effectively manage your projects, tasks, resources, documents, and issues across your organization.

- Project / Task Management
- Issue Management / Helpdesk
- Resource Tracking
- Reporting and Analysis
Project Management Features

- Project Management
  - Resource / Team Management
  - Project Collaboration and Communication
  - Project Scheduling
  - Timesheet Management
  - Task Management
  - MS Project Import / Export
1. Plan Project – Define Objectives, Tasks, Metrics, and Resources
2. Assignments – Assignments made based on available skills and resources
3. Collaboration – Team members coordinate by regularly posting status updates
4. Status Meetings – Determine state and take corrective measures if needed
5. Approval & Ongoing – Collaborate and approve changes
6. Reviews – Compare estimated resources to actuals
Project Management

- List of Projects

Status Flags
Links to Issues, Documents
Project Management

- Project Details

![Project Management Software Screenshot]

Click here to see notes updates for this project

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Project Management

- Project Notes
# Project Management

- Team Members and Roles

![Project Management Software Screenshot](image_url)

- View/Edit who is on your project team
# Project Management

## Task List

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Company</th>
<th>Access Level</th>
<th>Group</th>
<th>Pred</th>
<th>Assigned</th>
<th>%</th>
<th>Count</th>
<th>Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home page final content</td>
<td>AtTask, Inc.</td>
<td>System Administrator</td>
<td>Default Group</td>
<td>10/27/05</td>
<td>10/27/05</td>
<td>Brian Cook</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Position Statement</td>
<td>AtTask, Inc.</td>
<td>System Administrator</td>
<td>Default Group</td>
<td>10/27/05</td>
<td>10/27/05</td>
<td>Brian Cook</td>
<td>100</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Quotes</td>
<td>AtTask, Inc.</td>
<td>System Administrator</td>
<td>Default Group</td>
<td>10/27/05</td>
<td>10/27/05</td>
<td>Brian Cook</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Benefits</td>
<td>AtTask, Inc.</td>
<td>System Administrator</td>
<td>Default Group</td>
<td>10/27/05</td>
<td>10/27/05</td>
<td>Brian Cook</td>
<td>100</td>
<td>0</td>
</tr>
</tbody>
</table>

Use the task list to see the tasks for a project.

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Project Management

- Task Worksheet

![Task Worksheet Image]

Update multiple tasks at once.

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Project Management

- Resource Grid

Use the resource grid to see workload and tasks for users.
Project Management

- Gantt Chart

See the timelines for multiple projects together and see how your projects overlap or line up.
Project Management

Schedule Exceptions

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Project Management

- Project Notification

A link directly to the project issue

From: AtTask Web Team
Subject: Issue Assignment: Scheduling Page Returning 404 Error
Date: February 24, 2006 12:04:36 PM MST
To: Brian Cook

You have been assigned the following issue:

**Scheduling Page Returning 404 Error** (New Website)

Due Date: Mon, Feb 27, 2006 11:58 AM
Name: Scheduling Page Returning 404 Error
Project: New Website
Description:
The scheduling page doesn't seem to be working. It is displaying a 404 error. Can you please resolve this today?

Created On: Fri, Feb 24, 2006 11:58 AM
Entered By: Jared Larson
Issue Type: Issue
Status: New
Priority: Normal
Assigned To: Brian Cook
Helpdesk / Issue Management

- Integration with Projects
- Submit Issue through
  - Web browser
  - Email
- Define Routing Rules for Issues
- Custom Data Integration
- Private and Public Queues
- Automated Notification / Escalation via email
1. New Issues – Can be created in any current project (for Tasks or Helpdesk)
2. Routing Rules – Route to appropriate team members
3. Notification – Internal or external (e-mail) with links to issue for easy updating
4. Reviews – Can be routed to people for review and rerouted if necessary
5. Issue Assignment – Assign to projects, tasks or other issues
6. Issue Approval – Can set to require approval before being marked complete
7. Issue Completion – Users automatically notified of changes
8. Reports – Generated quickly and easily, many available out of the box
### Helpdesk – Queues

Select category/type to create new issue!

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IEC Helpdesk - ASI</td>
<td>Made, Writer, OpenOffice, StarOffice, ERP, Minitab</td>
</tr>
<tr>
<td>IEC Helpdesk - Application Servers</td>
<td>Oracle Application Server, Apache, Asos, JBoss, JEE, MS IS</td>
</tr>
<tr>
<td>IEC Helpdesk - Business Intelligence</td>
<td>Oracle Discoverer, Hyperion Performance Suite</td>
</tr>
<tr>
<td>IEC Helpdesk - CMS</td>
<td>Course Management Systems (angel, blackboard etc) related question should be submitted to this queue.</td>
</tr>
<tr>
<td>IEC Helpdesk - Confluence</td>
<td>All IEC's Confluence related questions should be submitted to this Helpdesk queue.</td>
</tr>
<tr>
<td>IEC Helpdesk - Database Development Tools</td>
<td>SQLPlus, Oracle Developer, Hyperion SOF, Oracle Designer, Oracle PRO<em>Cable and PRO</em>C</td>
</tr>
<tr>
<td>IEC Helpdesk - Database Technology</td>
<td>Oracle Video Server, SQLNet, Oracle RMAN, Oracle RDBMS, DB2C Networking, Oracle Identity Management, Oracle DataGuard, Oracle EM/EM Control</td>
</tr>
<tr>
<td>IEC Helpdesk - Networking</td>
<td>Networking related question should be submitted to this helpdesk queue.</td>
</tr>
<tr>
<td>IEC Helpdesk - Operating Systems</td>
<td>Questions related to AIX, HP-UX, Solaris, OpenVMS, Tru64, Windows, and other OS go to this helpdesk queue</td>
</tr>
<tr>
<td>IEC Helpdesk - Portal Technology</td>
<td>Oracle Portal, Brio Portal</td>
</tr>
<tr>
<td>IEC Helpdesk - Storage</td>
<td></td>
</tr>
<tr>
<td>IEC Helpdesk - Tivoli Storage Manager</td>
<td>Questions related to backup, restore, client install and other Tivoli storage manager requests go to this helpdesk queue</td>
</tr>
<tr>
<td>Remote Services - Banner BRO</td>
<td>Staff supporting Brockport for remote services</td>
</tr>
</tbody>
</table>

13 Results
Helpdesk – Create Issue

Click here to attach a file!
## Helpdesk – Issue Details

### Issue Details

<table>
<thead>
<tr>
<th>Issue</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Work Required 8 Hours</td>
</tr>
<tr>
<td>ID</td>
<td>Priority Normal</td>
</tr>
<tr>
<td>Description</td>
<td>Severity Cosmetic</td>
</tr>
<tr>
<td>Issue Type</td>
<td>Status In Progress</td>
</tr>
</tbody>
</table>

### Issue Information

- **Enterer By:** Test Helpdesk
- **Originator:** Test Helpdesk
- **Issues Resolved on Completion:**
  - ITEC Helpdesk - Confluence
  - Space Creation
  - Source Object
  - Resolving Object
  - Category
  - Job Role: Application Support
  - Assigned To: Leon Collins

### Planned Dates

- **Planned Start Date:** Tue, Mar 6, 2007 12:51 PM
- **Planned Completion Date:** Wed, Mar 7, 2007 12:51 PM

### Actual Dates

- **Actual Start Date:** Tue, Mar 6, 2007 12:52 PM
- **Actual Completion Date:**

### Entry Date

- **Entry Date:** Tue, Mar 6, 2007 12:52 PM

### Last Update Date

- **Last Update Date:** Wed, Mar 7, 2007 2:10 PM
- **Last Updated By:** Test Helpdesk

### Finance

- **Actual Cost:**
- **Actual Work:** 0 Hours
Helpdesk – Update Issue

Recent Notes

Note | Note
--- | ---
Test Helpdesk | Adding another note
Test Helpdesk | Adding a note
Scope Change | Assignment changed from "Unassigned" to "Leon Collins"
Scope Change | Status changed from "Now" to "In Progress"

Submit a new note

Subject

Message Recipients

- Leon Collins
- Test Helpdesk
- Caron Laja
- Tracey Zabrewski

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Reporting Workflow

1. New Issue
2. Routing Rules
3. Notification
4. Review
5. Project
6. Task
7. Issue
8. Reports

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Project Trend Analysis

View Baseline Reports

Performance
- EAC
- CSI
- CPI
- SPI

Duration
- Days
- Duration
- Actual Duration
- Work Required
- Actual Work Required

Costs
- Planned Cost
- Actual Cost

Percent
- Percent Complete

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**Time Keeping**

- Customizable Timesheets / Hour Types
- Real-Time Hours Entry
- Multiple Schedule Constraints
- Work Breakdown Structure
- Multiple Work Calendars
- Schedule Conflict Analysis
Time Tracking Flow

1. Assignments – People are assigned to projects, tasks, and/or issues
2. Timesheets – Are created according to pay periods
3. Time – Entered and allocated to project, task, or issue assignments
4. Review and Approval – Time entries checked and approved
5. Reports – User timesheets can be searched, charted, and reported on
### Timesheet

**Sunday 2/12/06 - Saturday 2/18/06**

<table>
<thead>
<tr>
<th>Timesheet Entries</th>
<th>Apply</th>
<th>Su</th>
<th>Mo</th>
<th>Tu</th>
<th>We</th>
<th>Th</th>
<th>Fr</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unapplied Hours</td>
<td></td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Quotes</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
</tr>
<tr>
<td>Benefits</td>
<td>✓</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>New Website</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**Per Day Total:** 0 1 3 1 2 1 0

**Timesheet Total:** 8

**Overtime:** 0

**Status:** Open

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@task Architecture

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