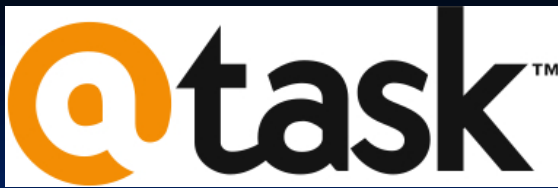
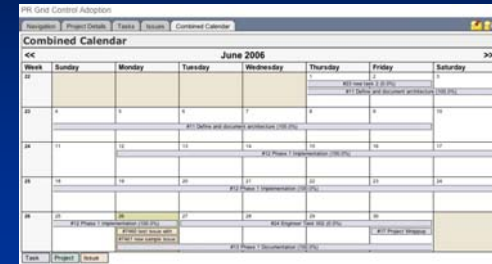
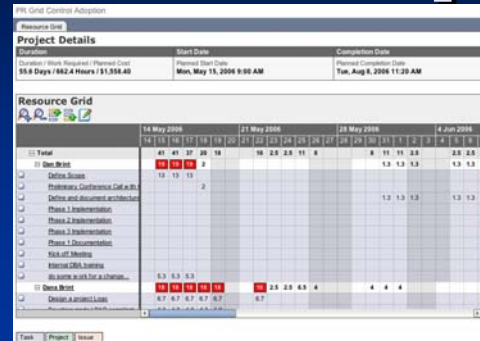
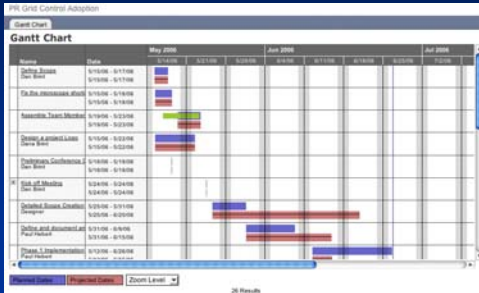


Why ITEC Needed Project Management and Helpdesk

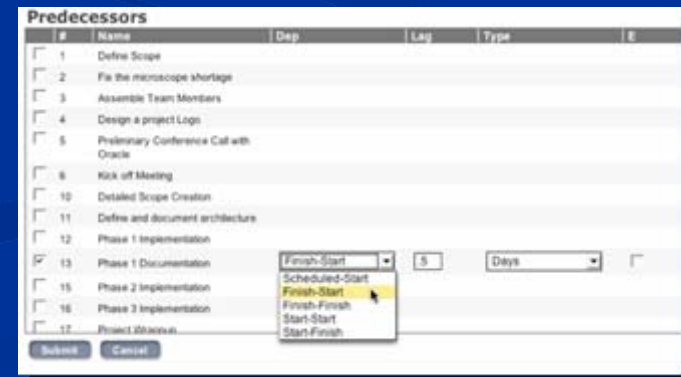
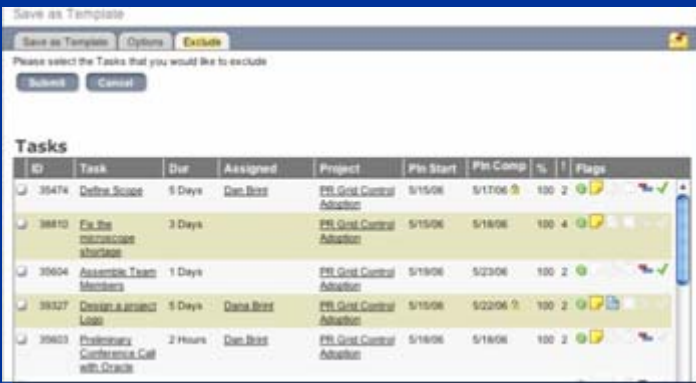
- Wanted all to be informed without being overwhelmed
 - People can focus on their specific tasks and issues
 - People can see everything going on in the project
 - Best of both worlds
- We needed:
 - A better way to work collaboratively
 - To easily see and change priorities
 - A better way to manage deadlines
 - Better reporting
- Last, but not least, we needed more Cow Bell!



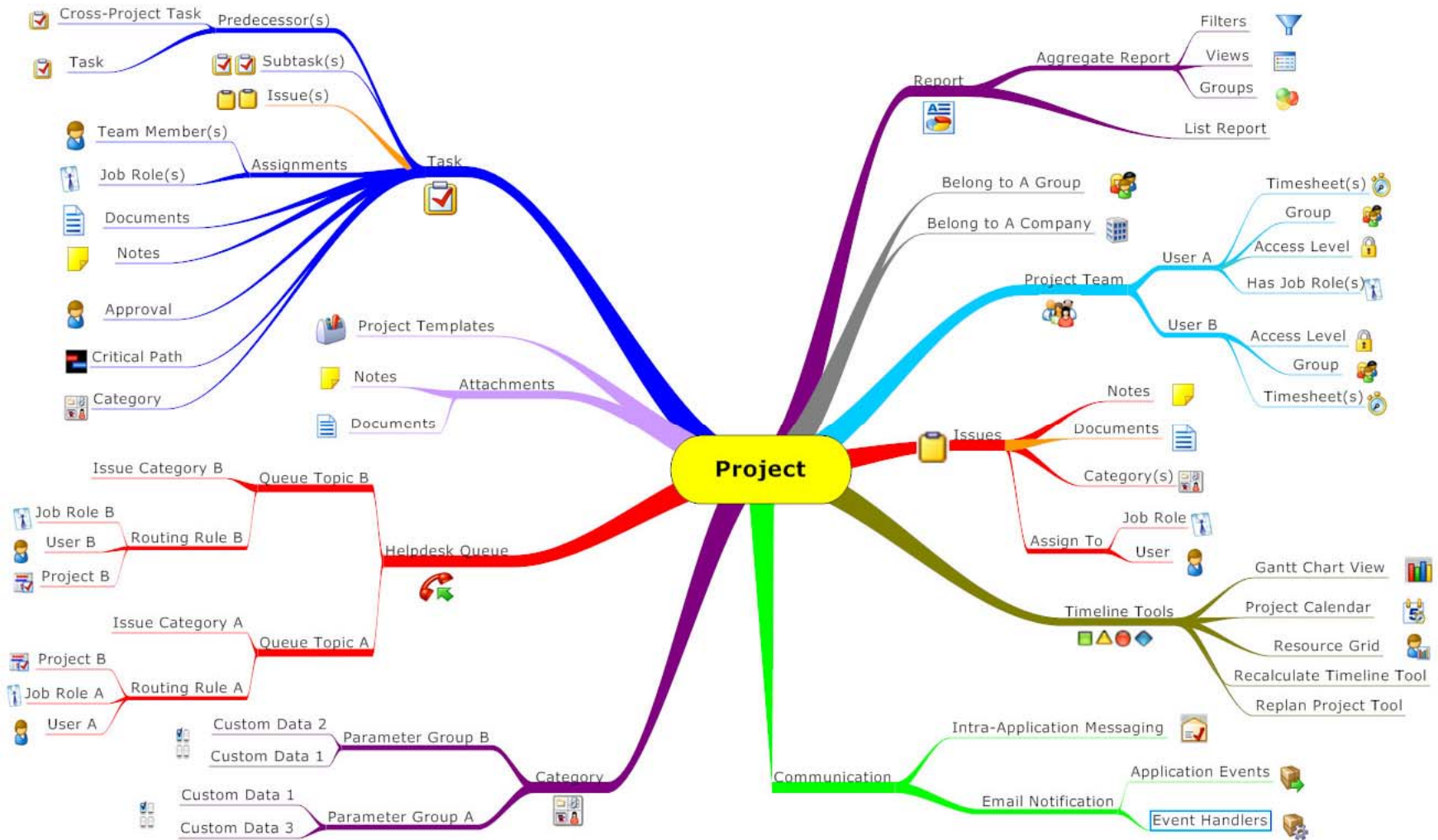
For Projects



- A fully functional, web based, team oriented, whiz click, project management tool.
- Functional without being 'heavy'



Project Management



What is AtTask?

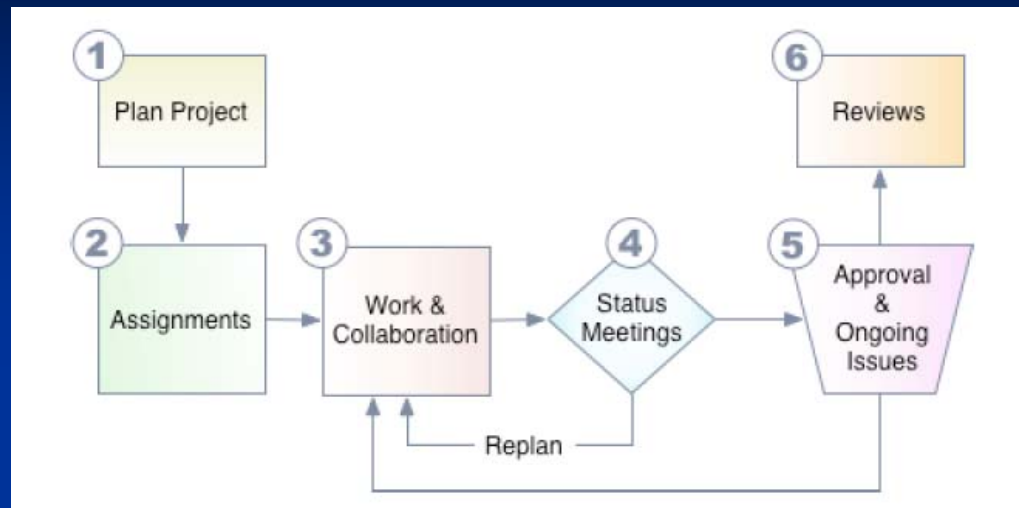
@task allows you to effectively manage your projects, tasks, resources, documents, and issues across your organization.

- 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

Project Management Flow



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

The screenshot displays the @task Project Management interface. The top navigation bar includes the @task logo, search filters (My..., Find..., Create..., Recent), and user information (Michael Not...). The main content area is titled 'Search Results' and contains a table of project entries. A callout box points to the 'Flags' column, indicating that it contains status flags and links to issues and documents.

ID	Name	Pln Comp	Proj Comp	%	Desc	Status	Flags
75	Attask Implementation	2/28/07	3/8/07	66.7	Project for the implementation of Attask	Current	2
45	ITEC Helpdesk - @task Issues	2/6/07	3/8/07	0	This helpdesk queue is for ITEC staff to create issues relate to using @task product	Current	2
19	ITEC Helpdesk - ASI	1/25/07	3/8/07	0	Maple, Mathematica, Solidworks, ESRI, Minitab	Current	2
84	ITEC Helpdesk - Application Servers	3/5/07	3/8/07	0	Oracle Application Server, Apache, Apache/Tomcat, JBoss, MS IIS	Current	2
83	ITEC Helpdesk - Business intelligence	3/5/07	3/8/07	0	Oracle Discoverer, Hyperion Performance Suite	Current	2
77	ITEC Helpdesk - CMS	3/2/07	3/8/07	0	All Course Management Systems (angel, blackboard etc) related question should be submitted to this queue.	Current	2
87	ITEC Helpdesk - Confluence	3/5/07	3/8/07	0	All ITEC's Confluence related questions should be submitted to this Helpdesk queue.	Current	2
82	ITEC Helpdesk - Database Development Tools	3/5/07	3/8/07	0	SQLPlus, Oracle Developer, Hyperion SGR, Oracle Designer, Oracle PRO*COBOL and PRO*C	Current	2
81	ITEC Helpdesk - Database Technology	3/5/07	3/8/07	0	Oracle Video Server, SQLNet, Oracle RMAN, Oracle RDBMS, ODBC Networking, Oracle Identity Management, Oracle Dataguard, Oracle EM/Grid Control	Current	2

Project Management

■ Project Details

The screenshot displays the @task Project Management interface. The main content area is titled 'Project Details' for the project 'ITEC Helpdesk - Database Technology'. The interface is divided into several sections:

- Project Information:** Name: ITEC Helpdesk - Database Technology; ID: 81; Description: Oracle Video Server, SQLNet, Oracle RMAN, Oracle RDBMS, ODBC Networking, Oracle Identity Management, Oracle Dataguard, Oracle EM/Grid Control.
- Resources:** Planned / Actual Duration: 0 Days / 0 Days; Planned / Actual Work: 0 Hours / 0 Hours.
- Status:** Current (indicated by a yellow flag icon); Progress / Condition: Late / On Target (indicated by a green flag icon); Priority: Normal; Timeline Type: Automatic and On Change; Schedule Mode: Schedule From Start Date; Completion Mode: Manual.
- Planned Dates:** Planned Start Date: Mon, Mar 5, 2007 9:00 AM; Planned Completion Date: Mon, Mar 5, 2007 9:00 AM.
- Projected Dates:** Projected Start Date: Thu, Mar 8, 2007 9:00 AM; Projected Completion Date: Thu, Mar 8, 2007 9:00 AM.
- Actual Dates:** Actual Start Date: (blank); Actual Completion Date: (blank).
- Entry Date:** Entry Date: Mon, Mar 5, 2007 10:18 AM.
- Last Update Date:** Last Update Date: Tue, Mar 6, 2007 11:40 AM; Last Updated By: Leon Collins.
- Finance:** Budget: \$0.00; Performance Index Method: Hour-Based; Fixed Revenue: \$0.00; Billed Revenue: \$0.00.
- Issues:** Number of Open Issues: 0; Issues resolved on completion: (blank).

A callout box with a blue border and white background points to the 'Current' status indicator, containing the text: 'Click here to see notes/ updates for this project'.

Project Management

■ Project Notes

The screenshot displays the @task Project Management interface. At the top, there is a navigation bar with search and filter options. A blue callout box points to the 'Recent Notes' tab, stating 'View all notes associated with a project'. The main content area is titled 'Recent Notes' and contains a list of notes. Each note entry includes the author's name, the date and time, and a brief description of the note's content. A 'Submit a new note' form is visible on the right side, featuring a 'Subject' field, a large text area, and a 'Private' checkbox. Below the form is a 'Message Recipients' list with several names and checkboxes.

Recent Notes

Author	Date	Content
Leon Collins	Tue, Mar 6, 2007 11:32 AM	Name changed from "ITEC @task Issues" to "ITEC Helpdesk - @task Issues"
Michael Notarius	Fri, Mar 2, 2007 11:55 PM	Hi Cairen! FYI, Jason requested an enhancement request to remove the "Topic" from the view, so if assigned incorrectly, it does not show up. People should still be able to reassign. THANK YOU! Mike :-)
Tracey Zakrzewski	Fri, Feb 23, 2007 12:23 PM	Jason has added this as a feature request. See http://confluence.itec.suny.edu/confluence/x/DhE for a list of all of our feature requests.
Tracey Zakrzewski	Fri, Feb 16, 2007 12:35 PM	Status changed from "New" to "In Progress"

Submit a new note

Subject

Private

Message Recipients

- Dennis Aharanwa
- Paul Bardak
- Barbara Boquard
- Chris Bordeleau
- Kelly Brace
- Daniel Brint
- Ronald Brown

Project Management

■ Team Members and Roles

Project Management -> Projects -> Search Projects -> Search Results -> Project

ITEC Helpdesk - Database Technology

Navigation Project Details Notes Tasks Issues **Team**

Users

Filter: None View: Project User List Group: None

Email	Name	Job Roles	PO	EO
	Daniel Brint	ITEC DBA	✓	✓
	Todd Randall	ITEC DBA	✓	✓
	Paul Hebert	ITEC DBA	✓	✓
	Joseph Lofft	ITEC DBA	✓	✓
	Jiu Feng	ITEC DBA	✓	✓
	Erik Snyder	ITEC DBA	✓	✓
	GayMarie Rodriguez	ITEC DBA	✓	✓
	Kelly Brace	ITEC DBA	✓	✓

8 Results

Job Roles

Filter: None View: Role Team List Group: None

Name	Users
ITEC DBA	Kelly Brace, Daniel Brint, Jiu Feng, Paul Hebert, Joseph Lofft, Todd Randall, Erik Snyder, GayMarie Rodriguez

1 Results

View / Edit who is on your project team

Project Management

■ Task List

Navigation Project Details Custom Data **Tasks**

Tasks

Filter: Milestone Tasks View: Project Tasks Group: Assigned To

#	Name	Dur	Pln Start	Pln Comp	Pred	Assigned	%	!
	Abe Knell	AtTask, Inc.	System Administrator	Default Group			3	72.0 Hours
✓ 2	<u>Position Statement</u>	1 days	10/27/05	10/27/05	🔒		100	2 🚫 📄 🗑️ 🔄 ✓
✓ 3	<u>Quotes</u>	1 days	10/27/05	10/27/05	🔒		100	0 🚫 📄 🗑️ 🔄 ✓
✓ 4	<u>Benefits</u>	1 days	10/27/05	10/27/05	🔒		100	0 🚫 📄 🗑️ 🔄 ✓
	Brian Cook	AtTask, Inc.	System Administrator	Default Group			14	620.0 Hours
✓ 1	<u>Home page final content</u>	1 days	10/27/05	10/27/05	🔒	Brian Cook	100	0 🚫 📄 🗑️ 🔄 ✓
✓ 5	<u>Main Nav</u>	1 days	10/27/05	10/27/05	🔒	Brian Cook	100	0 🚫 📄 🗑️ 🔄 ✓
✓ 6	<u>Sub Nav</u>	1 days	10/27/05	10/27/05	🔒	Brian Cook	100	0 🚫 📄 🗑️ 🔄 ✓
✓ 7	<u>Feature and benefit mapped</u>	5 days	10/31/05	11/4/05	🔒	Brian Cook	100	0 🚫 📄 🗑️ 🔄 ✓
✓ 8	<u>Feature and benefit content complete</u>	0.5 days	2/1/06	2/1/06	🔒	Brian Cook	100	3 🟢 📄 🗑️ 🔄 ✓
✓ 9	<u>Bene #1 - Schedule</u>	0.5 days	2/1/06	2/1/06	🔒	Brian Cook	100	2 🟢 📄 🗑️ 🔄 ✓
✓ 10	<u>Bene #2 - Rocket Science</u>	0.5 days	2/1/06	2/1/06	🔒	Brian Cook	100	2 🟢 📄 🗑️ 🔄 ✓
✓ 11	<u>Top navigation complete and forum integration</u>	5 days	12/5/05	12/9/05	🔒	Brian Cook	0	0 🚫 📄 🗑️ 🔄 ✓

11 Results

Use the task list to see the tasks for a project

Project Management

■ Task Worksheet

The screenshot displays the @task Project Management interface. At the top, there are navigation menus for 'My...', 'Find...', 'Create...', and 'Recent'. The main content area is titled 'Project Management -> Project -> Task' and shows a 'Task Worksheet' for a project named 'New Website'. A blue callout box points to the 'Task Worksheet' tab with the text 'Update multiple tasks at once.' Below this, the 'Project Details' section shows a duration of 52 days, a planned start date of Thu, Oct 27, 2005 9:00 AM, and a planned completion date of Mon, Jan 9, 2006 5:00 PM. The 'Task Worksheet' table lists 11 tasks with columns for S, D, #, Name, Duration, Pln Start, Pln Comp, Pred, Cnst, Constraint, and Assigned. At the bottom, there are 'Submit', 'Adjust', and 'Cancel' buttons.

Project Management -> Project -> Task

New Website

Task Worksheet

Update multiple tasks at once.

Project Details

Duration	Start Date	Completion Date
Duration 52 Days	Planned Start Date Thu, Oct 27, 2005 9:00 AM	Planned Completion Date Mon, Jan 9, 2006 5:00 PM

Task Worksheet

S	D	#	Name	Duration	Pln Start	Pln Comp	Pred	Cnst.	Constraint	Assigned
↓	✓	1	Home page final content	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/28/05 5:00 PM	Brian Cook
↓	✓	2	Possition Statement	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Abe Knell
↓	✓	3	Quotes	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Abe Knell
↓	✓	4	Benefits	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Abe Knell
↓	✓	5	Features	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Abe Knell
↓	✓	6	Main Nav	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Brian Cook
↓	✓	7	Calls to Action	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Brian Cook
↓	✓	8	Sub Nav	1 days	10/27/05 9:00 AM	10/27/05 5:00 PM		FNLT	10/27/05 5:00 PM	Brian Cook
↓	✓	9	Feature and benefit mapped	5 days	10/31/05 9:00 AM	11/4/05 5:00 PM		FNLT	11/4/05 5:00 PM	Brian Cook
↓	✓	10	Feature and benefit complete	10 days	11/7/05 9:00 AM	11/18/05 5:00 PM		FNLT	11/18/05 5:00 PM	Brian Cook
↓	✓	11	Call to action	5 days	11/21/05 9:00 AM	11/25/05 5:00 PM		FNLT	11/25/05 5:00 PM	Brian Cook

Submit **Adjust** **Cancel**

Project Management

■ Resource Grid

The screenshot displays the @task software interface. The top navigation bar includes search and filter options. The left sidebar contains a menu with options like 'Application Home', 'Project', 'Timelines', 'Gantt Chart', 'Calendar', 'Resource Grid', 'Recalculate Timeline', 'Replan Project', 'Team', 'Attachments', 'Import/Export', and 'Issues Setup'. The main content area shows 'Project Details' for 'New Website' with a duration of 70 days, starting on Oct 27, 2005, and ending on Feb 16, 2006. Below this is the 'Resource Grid' for the project, which is a calendar view showing workload for users Brian and Abe. A callout box points to the grid with the text: 'Use the resource grid to see workload and tasks for users'.

Project Details

Duration	Start Date	Completion Date
Duration 70 Days	Planned Start Date Thu, Oct 27, 2005 9:00 AM	Planned Completion Date Thu, Feb 16, 2006 5:00 PM

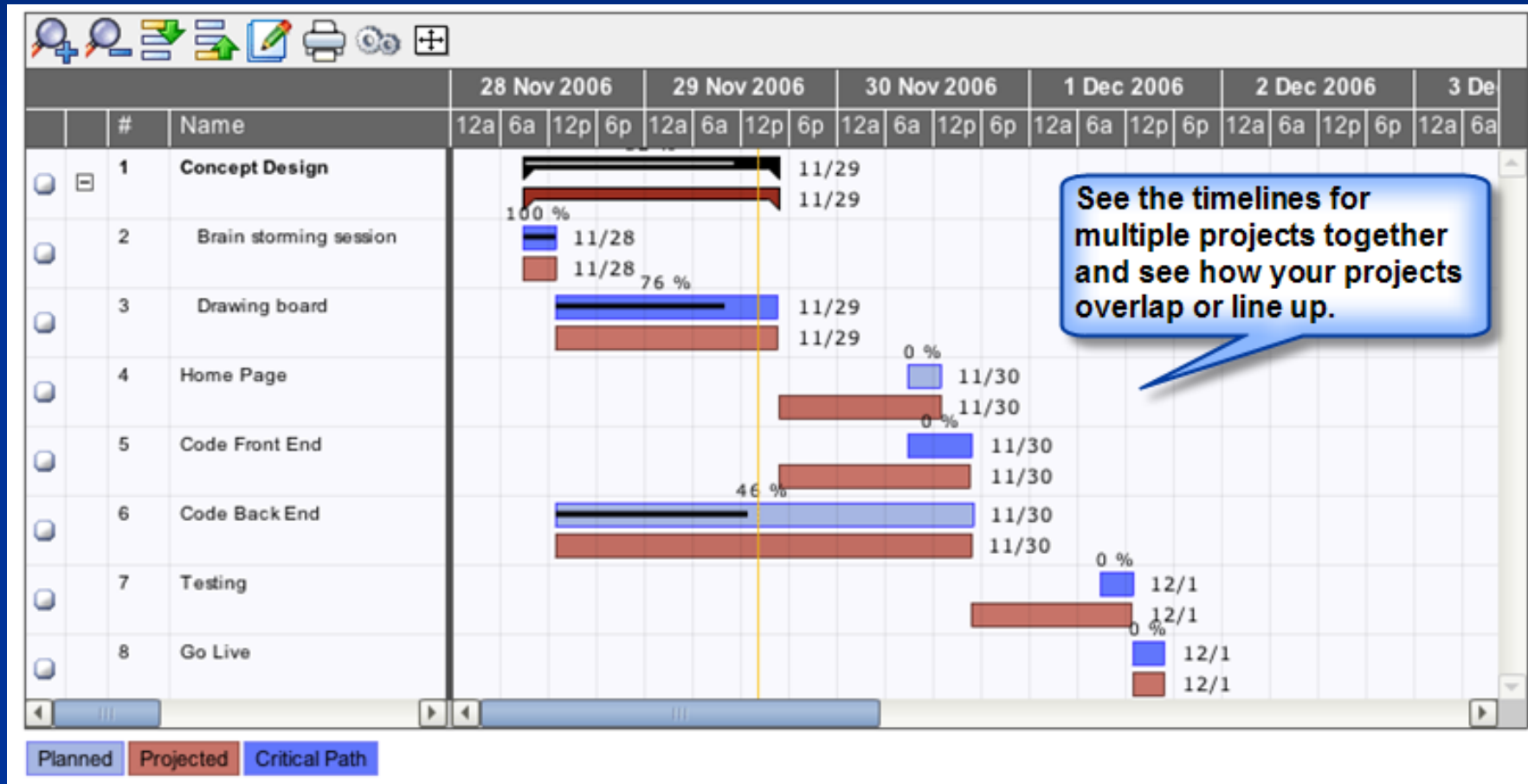
Resource Grid

	22 Jan 2006							29 Jan 2006							5 Feb 2006		
	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
Total			13	6	7	14			16	24	18						
Brian			7	6	4	5			16	24	18						
Concept Design			5														
Content Writing			2	6													
UI development					4	5											
Database Setup											10						
Approval Rejected									8	8							
Approval Rejected									8	8							
Approval Rejected											8	8					
Abe			6		3	9											
Position Statement			6		3	1											
Quotes						8											

Task Project Issue

Project Management

■ Gantt Chart



Project Management

■ Project Notification

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

A link directly to the project issue

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?

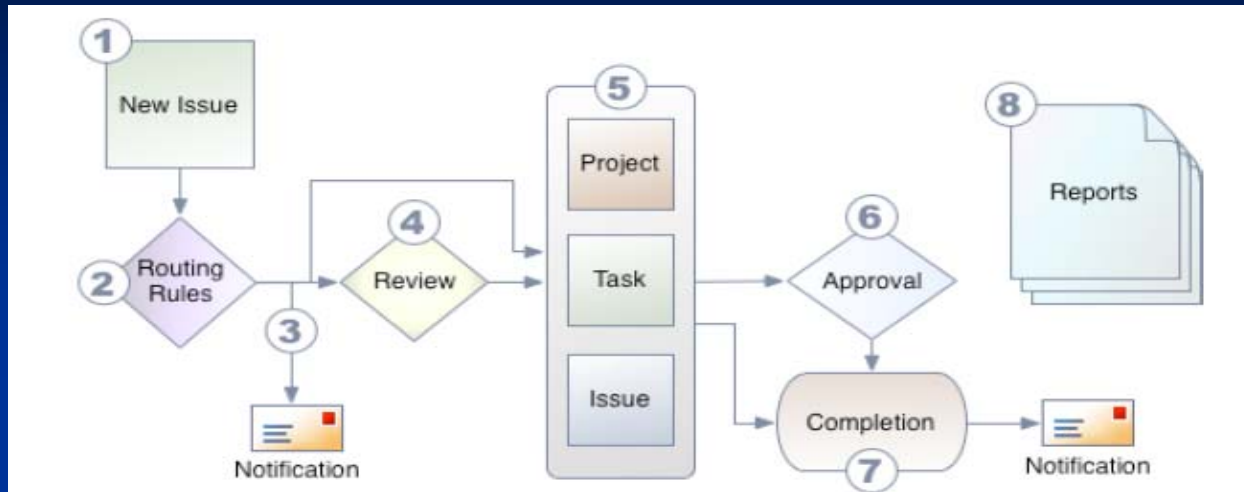
Created On: **Fri, Feb 24, 2006 11:58 AM**
Entered By: **Jared Larson**
Issue Type: **Issue**
Status: **New**
Priority: **Normal**

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

Helpdesk / Issue Tracking Flow



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

The screenshot shows the @task Helpdesk interface. On the left is a navigation menu with 'Home', 'Quick Links', and 'My Profile'. The main content area is titled '@task Home' and 'Help Desk'. Below this is a table of 'Help Desk Queues'. A blue callout bubble with a white border and a pointer to the table contains the text: 'Select category/type to create new issue!'.

Name	Description
ITEC Helpdesk - ASI	Maple, Mathematica, Solidworks, ESRI, Minitab
ITEC Helpdesk - Application Servers	Oracle Application Server, Apache, Apache/Tomcat, JBoss, MS IIS
ITEC Helpdesk - Business intelligence	Oracle Discoverer, Hyperion Performance Suite
ITEC Helpdesk - CMS	All Course Management Systems (angel, blackboard etc) related question should be submitted to this queue.
ITEC Helpdesk - Confluence	All ITEC's Confluence related questions should be submitted to this Helpdesk queue.
ITEC Helpdesk - Database Development Tools	SQLPlus, Oracle Developer, Hyperion SQR, Oracle Designer, Oracle PRO*Cobol and PRO*C
ITEC Helpdesk - Database Technology	Oracle Video Server, SQLNet, Oracle RMAN, Oracle RDBMS, ODBC Networking, Oracle Identity Management, Oracle Dataguard, Oracle EM/Grid Control
ITEC Helpdesk - Networking	Networking related question should be submitted to this helpdesk queue.
ITEC Helpdesk - Operating Systems	Questions related to AIX, HP-UX, Solaris, OpenVMS, Tru64, Windows, and other OS go to this helpdesk queue
ITEC Helpdesk - Portal Technology	Oracle Portal, Brio Portal
ITEC Helpdesk - Storage	
ITEC Helpdesk - Tivoli Storage Manager	Questions related to backup, restore, client install and other Tivoli storage manager requests go to this helpdesk queue
Remote Services - Banner BRO	Staff supporting Brockport for remote services

13 Results

Helpdesk – Create Issue

The screenshot shows the @task Helpdesk interface. At the top, there is a navigation bar with the @task logo, search fields (My..., Find..., Recent), and user information (Test Helpdesk). A left sidebar contains a 'Menu' with 'Home' and 'Issue' options. The main content area is titled '@task Home' and 'New Issue'. Below this, there are two tabs: 'New Issue' and 'New Document'. A blue callout box with a white border and a blue arrow points to the 'New Document' tab, containing the text 'Click here to attach a file!'. The 'New Issue' form contains the following fields:

- Topic: ODBC Networking (dropdown)
- Issue Type: Issue (dropdown)
- Issue: [Text input field]
- Description: [Text area]
- Priority: Normal (dropdown)

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

Helpdesk – Issue Details

@task™ My... Find... Recent

@task Home -> Issue Test Helpdesk

Assign this to Leon

Issue Details Custom Data Update Issue Status Recent Notes

Issue Details

Issue	Resources	Planned Dates
Name Assign this to Leon	Work Required 8 Hours	Planned Start Date Tue, Mar 6, 2007 1:51 PM
ID 109	Priority Normal	Planned Completion Date Wed, Mar 7, 2007 1:51 PM
Description Assign this to Leon	Severity Cosmetic	Actual Dates
Type Issue	Status In Progress	Actual Start Date Tue, Mar 6, 2007 1:51 PM
Entered By Test Helpdesk	URL	Actual Completion Date
Originator Test Helpdesk	Related Information	Entry Date
Issues	Project ITEC Helpdesk - Confluence	Entry Date Tue, Mar 6, 2007 1:52 PM
Issues resolved on completion	Topic Space Creation	Last Update Date
	Source Object	Last Update Date Wed, Mar 7, 2007 2:10 PM
	Resolving Object	Last Updated By Test Helpdesk
	Category	Finance
	Job Role Application Support	Actual Cost
	Assigned To Leon Collins	Actual Work 0 Hours

Click here to view notes/updates for this issue.

Helpdesk – Update Issue

@task™ My... Find... Recent

Menu
Home
Issue
Attachments
Recent Notes
All Notes
Search Notes
New Note
View Documents
New Document

@task Home -> Issue Leon Collins

Assign this to Leon

Issue Details Custom Data Update Issue Status Recent Notes

Recent Notes

Filter: None View: Note Historylist Group: None

Note	Note
Test Helpdesk Wed, Mar 7, 2007 2:10 PM Assign this to Leon	Adding another note
Status Change Wed, Mar 7, 2007 2:10 PM Assign this to Leon	Adding a Note Status changed from "New" to "In Progress"
Scope Change Leon Collins Tue, Mar 6, 2007 1:52 PM Assign this to Leon	Assignment changed from "Unassigned" to "Leon Collins"

Submit a new note

Subject

Private

Message Recipients

- Leon Collins
- Test Helpdesk
- Cairen Lajia
- Tracey Zakrzewski

Submit Cancel

3 Results

Helpdesk – View Issues

The screenshot displays the @task helpdesk interface. At the top, there is a navigation bar with the @task logo and several dropdown menus for 'My...', 'Find...', 'Create...', and 'Recent'. A user profile 'Tracey Zakrzewski' is visible in the top right corner. On the left, a 'Menu' sidebar contains links for 'Home', 'Quick Links', 'My Profile', 'My Approvals', 'My Tasks', and 'My Projects'. The main content area is divided into two sections: 'My Issues' and 'My Unassigned Issues'. Each section features a table of issues with columns for ID, Name, Source, Type, Assigned, Entry, Status, Priority, and Flags. The 'My Issues' section shows one issue (ID 90) with a status of 'In Progress'. The 'My Unassigned Issues' section shows one issue (ID 71) with a status of 'New'.

My Issues

ID	Name	Source	Type	Assigned	Entry	Status	Priority	Flags
90	e-mails sent when notes are added are difficult to create rules for...	ITEC Helpdesk - @task Issues		Tracey Zakrzewski	2/16/07	In Progress	Normal	

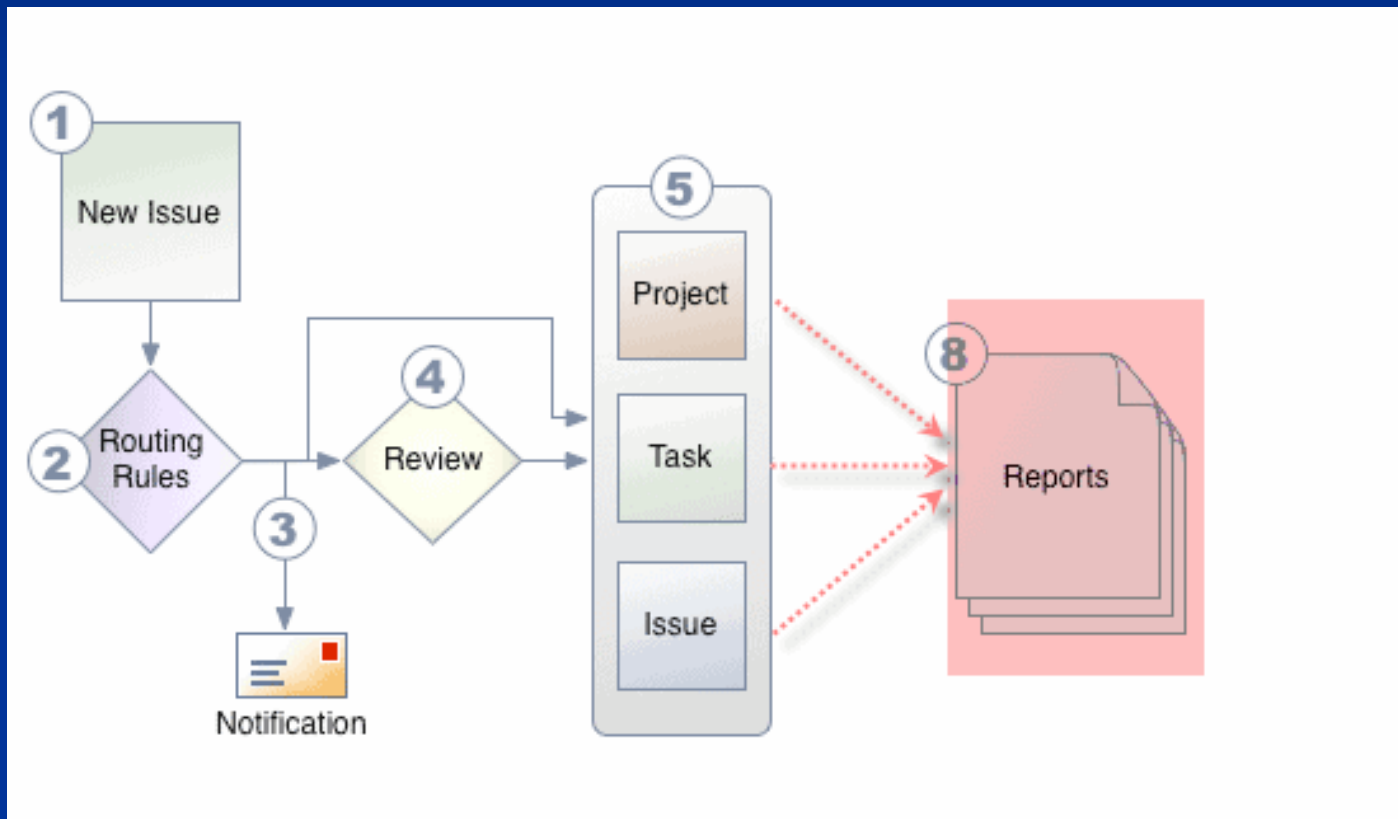
1 Result

My Unassigned Issues

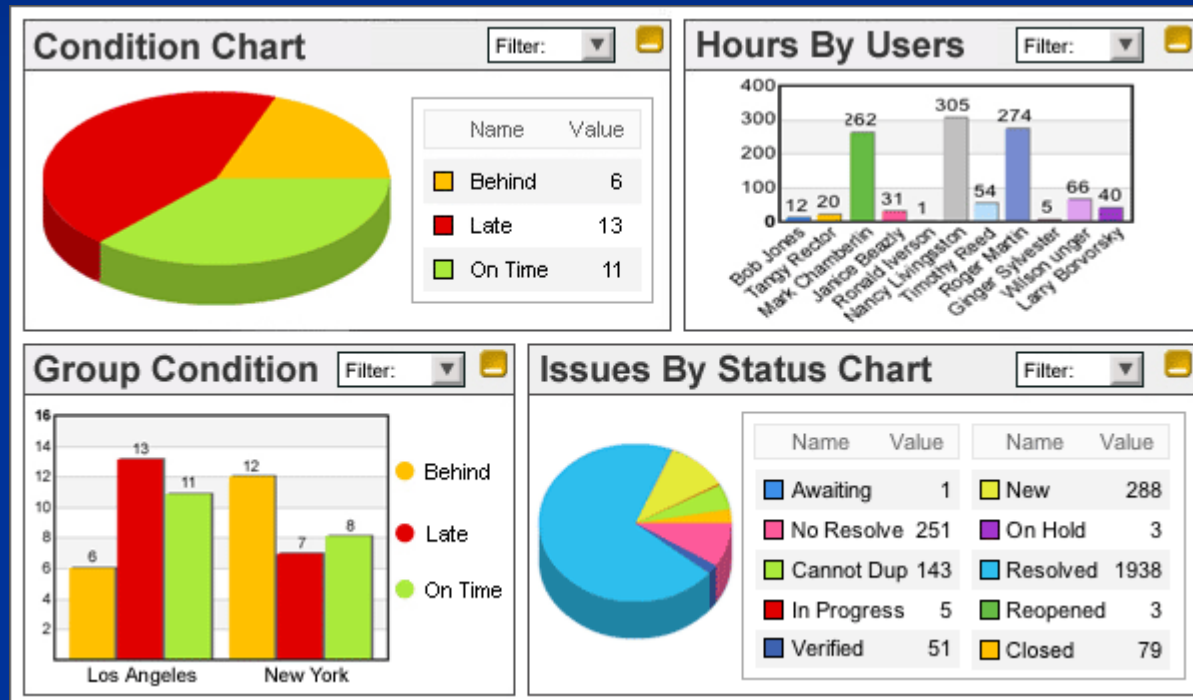
ID	Name	Source	Type	Assigned	Entry	Status	Priority	Flags
71	9.2 and 9.1 software request	ITEC Helpdesk - ASI		Application Support	2/9/07	New	High	

1 Result

Reporting Workflow



Reporting Tools



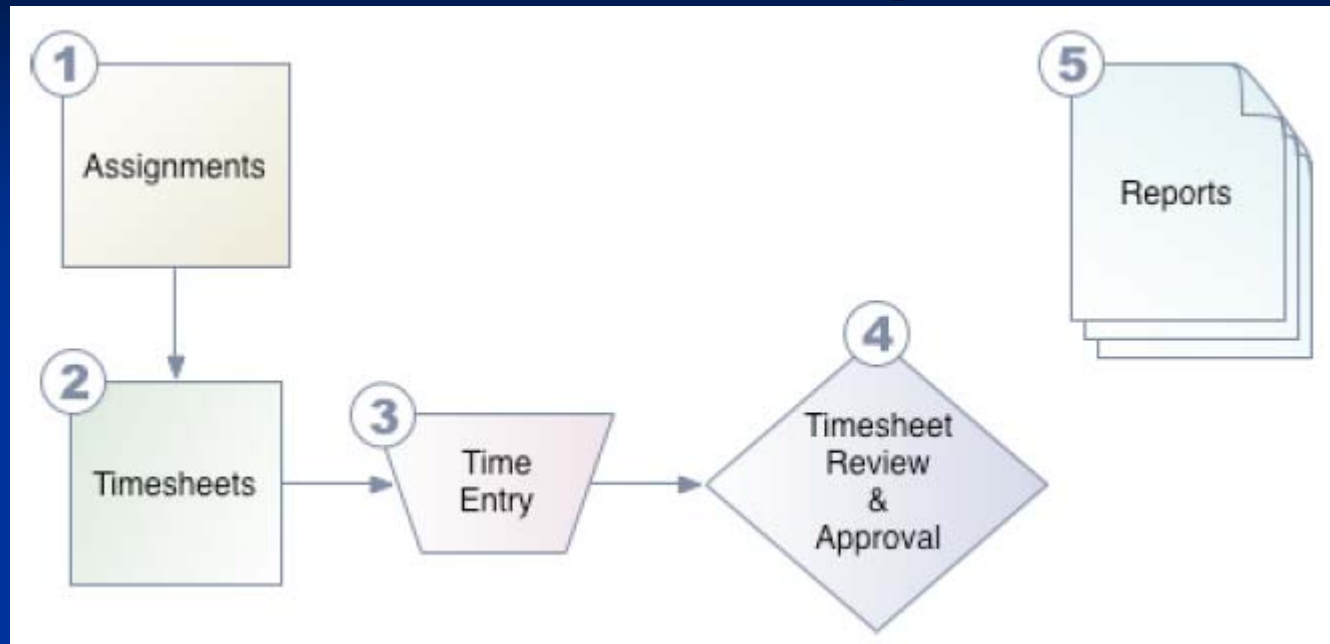
Project Trend Analysis



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

Timesheet

Sunday 2/12/06 - Saturday 2/18/06									
Timesheet Entries			Su	Mo	Tu	We	Th	Fr	Sa
Unapplied Hours	Apply	-	Su	Mo	Tu	We	Th	Fr	Sa
<u>Quotes</u>	<input checked="" type="checkbox"/>	1	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<u>Benefits</u>	<input checked="" type="checkbox"/>	3	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<u>New Website</u>	<input checked="" type="checkbox"/>		<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
Per Day Total:			0	1	3	1	2	1	0
Timesheet Total:									8
						Overtime	<input type="text" value="0"/>		
						Status	<input type="text" value="Open"/>		

Submit

Cancel

@task Architecture

