



# **Support Tracker How2**

## **Effectively Work With Support Tracker**

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Welcome to the How to Effectively Work With Support Tracker Guide!

This document has main goal – to explain you our view at using of Support Tracker as a tool that would improve your process of software development or another one. This guide contains our idea of using the product in the way of the most effective usage.

Please, be inspired and think about your way of using the Support Tracker.

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## 1 Support Tracker

This document explains our idea how to work effectively with Support Tracker. At the beginning we have to notice that this is OUR idea and it has nothing to do with your way of future using of the product. We know that there doesn't exist the same business in the whole World so please understand this document as help for your business, not as a rule.

## 2 Using of Support Tracker

There is not specific rule for using of the product. Well, the product has been surely designed to help within the software development process but no one says that Support Tracker must be used only within this process. Because it contains a very simple Workflow process it would be used everywhere when the simple Workflow is required.

The internal Workflow of Support Tracker is specific and especially designed for the software development but here are others examples of ways of using the product.

### 2.1 Using within the whole / small company

At every company, the size doesn't matter, there are many tasks that have to be completed and it is required to store the state of the processing.

For example, you sell a PC stuff - so you have an administrator, who is responsible for internal PC infrastructure, a sales guy, who is responsible for selling of stuff, a tester, who is responsible for testing of new stuff and supporting of existing solutions and a supporter, who is responsible for the stuff packing, installing of software, and solving of customer's needs. Surely, within your company you call that roles differently but try to think about to generalize your current roles to the previous list of roles.

Within those users you need to share their tasks. So why not use Support Tracker? It contains the simple Workflow for users/ teams co-operation so it would solve your problems with assigning of tasks to particular users and with keeping their states.

### 2.2 Using within just one department

Just imagine that you have a big contact centre where you have to communicate with customers, send and receive some delivery and solve some customer's needs.

Usually, you have already settled up some 'role-based' system that says that your employee A is responsible for support of customers, the employee B is responsible for system maintaining, the employee C is responsible for deliveries and at last, the employee D is responsible for on-time customer's solutions. Probably, you have more roles within your existing solution but the key thing is that one employee is responsible for a specific area of task. Well, it's fine until yet. But what happen when the employee A leaves your company or is get ill? You have to settle an emergency plan for continuing of your contact centre and you will probably call the employee A for help, because only he knows what customer need, what and how to fix what.

When you implement Support Tracker you would start to use knowledge base that has access to all already-done solutions; so when you need to have a look what has been

done you have a big chance for successful research. Support Tracker offers replace, in this case together with detailed recording of tasks, analysing of states and working effort.

## 2.3 Using elsewhere

Have you got a clue? There are no limitations of using Support Tracker. The software always means limitations; but the idea of role-based working flow has no limit within a working process. Support Tracker just supports the idea of role-based system. It doesn't contain it. So, the key thing if implementing of Support Tracker is to find how and where to implement it to get the best result.

It is our part to find it out so if you have no idea of how to use Support Tracker within your business please contacts the company and we will provide an implementation study to find out the best way for you and your business.

## 3 Knowledge Base & Error Records

The basic element of every Support Tracker Installation is the knowledge base. It is built by the time of using of the product. You build it so it depends only on you how helpful the knowledge base would be.

The knowledge base is open to all users of the system. There are no limitations of using of it but we would advise this usage:

1. The knowledge base would be used by Supporter role mainly. This role has the most optimised access mechanism to the knowledge base.
2. Use the knowledge base only when you really need to use it. The using of it slowdowns all database transactions so when there are many users connected at one time and some of them using the knowledge base there should be performance problems noticed.
3. Try to specify the most adequate search query that suits the best to your request. It would help you with the amount of data returned.
4. If there is no result from the knowledge base's query do not panic. Try to specify your query more precisely or widely. The search engine within the server is calibrated to return the most fits result so sometime it seems that you can't find what are you looking for.
5. And at last, when you need some research within the knowledge base try fist to ask your team workers, especially supporters, for help. It happens that what are you looking for is widely know within the team. And obviously, the supporter is the key person who has the biggest knowledge of the knowledge base – just because he is using it the most.

### 3.1 Data store

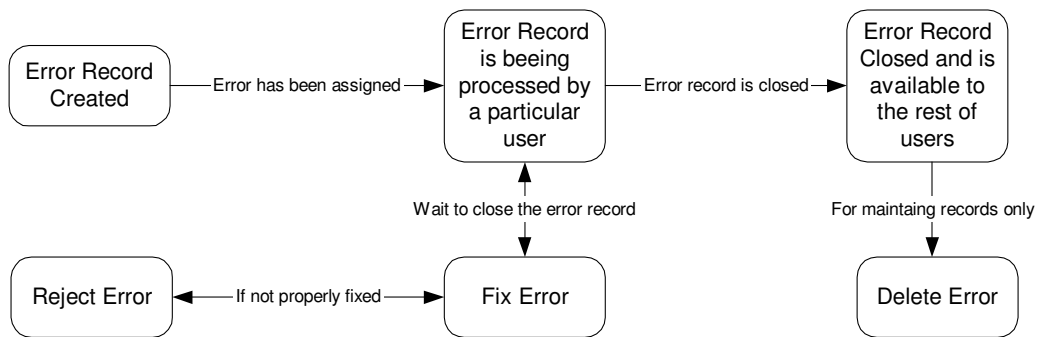
Obviously, information needs a space. Support Tracker is able to connect to whatever data storage system exists through the standards, all database vendors supported interface.

The basic solution is using well-known Microsoft© Access™ database to store the data. The Access database has been chosen as a low-end data storage solution because many users in the World have successfully tested it for ages. The database is distributed with the installation of the product and is prepared for on-time usage.

We know that more transactions & users need more powerful database engine. We have chosen Microsoft© SQL Server™ and Oracle© Server™ as our mid-size business solution. Those databases are not distributed with Support Tracker because there is more work involved in proper configuration and setting up of the database. In the case that you are interested in one of those engines please [contact the company](#) for additional information and instructions. We will provide all database configuration needed.

### 3.2 Error record flow

The error record flow can be described shortly – the error record is active from the time it has been found until is closed. The active state means that the record wouldn't be used by knowledge base or others users of the system. The flow is between a creator and a responsible person only. No one else should be involved in, from the system point of view.



**Fig. 1 – Simple view to the error record flow**

The figure above displays the error record flow. You can see that the simple view is really simple – the error is created in the system, processed and closed. From the beginning to the end the error is described internally by a unique identifier so it can be simply recognised by the system in all states through them is the record flowing. From the time that is the record closed it is available to the rest of users through the knowledge base.

The error record should be surely also removed from the system. It has to be done by the system administrator only and it is definitely **NOT RECOMMENDED** action. Only closed error record can be removed from the system and it is **UNREVERTABLE** action so please bear in mind that when you remove the error record you are always losing knowledge that is carried by the error record. Please, remove records only when you definitely need to do it.

## 4 Best Practices

This chapter contains a list of “best practices” as we would like to see them. Mainly, the chapter contains information about Support Trackers roles and using of them.

### 4.1 Roles

Support Tracker contains by default four types of user roles:

1. **Administrator** – it is a person who has a full control about Support Tracker. The administrator has the full, non-controlled access to Support Tracker (knowledge base, system settings, role controlling).
2. **Tester** – it is a person who is responsible for testing of products or a process. His key role is to find and explore new errors within the product and to report them.
3. **Supporter** – it is a user who mainly supports products or a process. It can also support all existing solutions in the previous version. His key role is to support the solution and to help clients with their problems.
4. **Developer** – it is a user who is responsible for creating of product or a process. It can also develop whatever you think that developer could, for example to build a house, create tasks, whatever.

These roles, as explained above, are just **ADVISED** roles. There are set up by the system but the meaning of them is freely defined. For example, if supporter delivers for example a pizza (so he is a delivery boy), the system would see him as a supporter, but you obviously know that supporter = delivery boy. Please remember that the name of the role has been set up by the system, not the meaning of the role.

When you wish to customize the name of a particular role, it is surely possible, but not in the widely distributed version. Please [contact the company](#) for additional information and instructions.

### 4.2 Using of roles

The most important setting of Support Tracker system is setting of users roles. When you wish to improve your current process you have to think first about particular roles for particular users. There is no sense to give administrator rights to a user who has no idea about administrating of any system. Within Support Tracker is this assigning more complicated because for example the administrator is not that user who only knows system stuff of IT department. He is also that user who is responsible for maintaining of knowledge base and who would be firstly asked by users when some problem within the process occurs.

From this example you would see that to assign roles is not so simple how it should be seen at the beginning. So, to bind the right role to the right user you would have a look to the current process that you want to fuel. There you would see the right assignment.

Anyway, do not worry about that because you can always change the department (understand role) of particular user in the future.

### 4.2.1 Migrating of users

Migrating of users is supported by the system; for example when a user became a support guy from a tester position, the administrator of the system is able to change the user assignment within the system by a simple operation within the system settings. You don't have to be worry about loosing of information that are assigned to the migrating users. The relevant information will be connected with the user – it doesn't matter in which department is the user present.

### 4.2.2 Roles rights - simple view

Roles are described by all Support Tracker guidebooks in more details. Here is just a small extraction of the real meaning of roles but it is the most logical view that is explaining roles from the system point of view that should be found.

The **administrator** administrates the system. That means that he is the most powerful user of the system. The rest of roles depend at the administrator settings.

The **supporter** has the most powerful search engine hidden behind his role. His workspace is optimised for a fast search result through whole Support Tracker.

The **tester** has optimised search engine and the user interface for best manipulating with error records. His user interface looks like the administrator, except deleting of error records.

The **developer** is focused to fixing of assigned error records so his workspace is optimised for it. There are no advance UI controls or additional system features like the tester and the administrator has.

## 4.3 Communication

With no concessive the communication is the base stone of the success everywhere else.

And as everywhere else you have to focus to communication within your teams (departments, roles) to gain a success. You already know how to communicate within your business so do not change it. Support Tracker is just a tool that would improve your communication from the system point of view (archiving of communication, etc.).

We would like to advise these steps to you:

1. When you find an error and you want to create a new record always first check if the error wasn't already fixed. It doesn't means that you have to go through the whole knowledge base to find it out – it is about a communication with your co-workers or with a responsible person. It is always better to ask then create an unusable error record.
2. Before you fix or close an error record always check if the problem has been really superseded. In the case that not, you would be responsible for addition work created by your wrong decision. It wouldn't definitely make work easier to you colleagues.
3. Always is better & faster to ask around for some uncertain things than to play around with the system. It is not forbidden to play with the application – it would always help you to better understand the system – but when you need to improve your work process it is better to share knowledge with your colleagues.

### 4.3.1 Sharing of knowledge

Your co-workers are always unique persons. There is no one who thinks the same as you think. Because of that the best way how to get up with using of Support Tracker is to share your knowledge with the others. The best way how to do it is through:

- Regular workgroups meetings
- From time-to-time workshops
- Questionnaire

It is always very important to have prepared some key elements that you want to discuss. The best way is to send around a simple question form and then discuss the answers. You will not believe how differently people think.

## 4.4 Contact the company

We are always ready to help you with the implementation of Support Tracker so do not hesitate to [contact us](#) with your problem. We believe that the most problems exist just because some misunderstanding occurred.

We have a strong knowledge with the implementing a new business strategies and processes so we are able to help you to decide where exactly is to implement Support Tracker and how. Maybe, just because you cannot imagine where exactly to use Support Tracker within your process just says that the process itself have to be changed.

We are offering you analyse that will be designed and focused just to your particular problem. Our analyst will examine your whole process and advise the best solution.

Let us help you.

## 5 Support

If you need some additional information about the company products or you must get confused with the description of some functionality described in here please contact the technical support of the company through our web site or through the E-mail:

Company web site: <http://www.compoundev.com/>  
Support E-mail: <mailto:support@compoundev.com>

When you contact the company because of the support please do not forget to include these information:

- Your customer registered name and ID
- Your system configuration
- The error description
- Both log files (server & client)
- Short description of your problem from your point of view

The company's support department will solve your problem as soon as possible and it will advise you the solution that will always fit your requirements.

With other enquiries please [contact the company](#).

We wish you to have a simple agenda with using of Support Tracker.