



How to Select Issue Tracking Software

White Paper

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Today's busy world requires tracking of various items for different businesses, from accounting or human resources to work and service requests. These items keep businesses moving, people employed and customers happy. There are various methods of tracking these items, ranging from something as simple as sticky notes and email, to spreadsheets or issue tracking software. The ultimate goal is to utilize a tool that brings order to the chaos of all the processes and procedures that must be followed. Each company has their own unique set of requirements that any purchased software package needs to handle.

Configurability and Flexibility

Issue tracking can be a very tough area for an off-the-shelf software package to handle. Some companies may elect to build their own issue tracking software to truly allow for all the features and functionality needed to support their processes. However, in today's environment, the resources available to create software in-house can be hard to find, time consuming and expensive. It's also potentially frustrating as you wait for the product to be delivered and supported after delivery. When purchasing off-the-shelf software, look for a high amount of flexibility in the configuration and the ability to activate only the features that important to your needs. Examine various packages to determine what best suits your needs without an unacceptable amount of tradeoffs.

Process Support and Workflows

Issue tracking often needs to support processes or workflow to complete the requirements for closing an issue. Approvals to process checkpoints all allow you to follow the progression of an issue and ensure that everything is completed before the issue is closed. Some companies even need the software to support compliance with Sarbanes-Oxley or HIPAA regulations. The various software products handle this in different ways. Make sure to check with your vendor to understand how each software package works and whether it provides you with the appropriate visibility and accountability.

Budget Considerations

There are a broad range of prices available from different vendors ranging from free to very expensive. Get an idea of what your company can afford. If your budget truly is \$0, your search should begin with free products. If you have even the smallest budget, concentrate on what your money can purchase and compare it to the needs of your company.

Architecture

In the world of issue tracking software, there are three basic architectural models that software vendors use. Each can have advantages and disadvantages to you. Understanding the architecture is an important step in your purchase decision.

Hosted or Cloud Based

In this case you do not own the software, but you are leasing or renting the software from a vendor and they are providing you access to it through a web site. The advantage is that all management of the servers is done for you and all equipment expenses are incurred by the software vendor. The disadvantage is that you do not own the software, and do not have direct access to the software or your



data. In some cases the data you entered is not even yours anymore.

Installed on your Servers

You install the software on your own servers and manage the server, data and the website. The advantage is that you own your data, and in many cases, the software. You can access the data directly if you need to update or change it in the tables. The disadvantage is that you must maintain the servers and the operational software.

Lease

Some companies provide monthly or yearly leases to use the software for the term of the lease. The software may be either hosted by the vendor or installed on your servers. While less expensive to get started, it may prove to be a more expensive option as years pass. Make sure you understand where the break-even point is on either hosted or installed options and see if you get credit for any dollars invested if you go from lease to own.

If you decide to go for the owned software or the leased software, check to see if the database (such as SQL) is included in the software package or if it needs to be a separate purchase. Find this out early in the discovery period so you will know how this expense will affect your budget.

Client/Server vs. Web Based

In the past, it was common to have issue tracking software that required an application be installed on each PC before the system could be accessed and operated. These client side applications would then update the server with any appropriate information. Client/Server installations provide an excellent way for your users to input their information and tend to be very secure and fast. However, they have a heavy price to pay on the administration side. The application must be deployed to the users and supported like any other application on the network.

Because of the heavy drain on resources to administer this type of system, many software providers have developed web-based applications.

Web-based applications need only an internet browser and a URL to operate. Nothing needs to be installed on client side machines. You can operate the software using SSL to provide secure communications to the server. Web-based applications are not limited to any particular computer, but can be accessed by any device with web access. People on the go can use their net books, laptops or even mobile phones to enter and respond to tickets.

How can you tell the difference between client/server and web-based in a software demonstration?

If you are required to load code on your desktop to begin the demo, you are not dealing with a vendor that offers web-based software. True web-based systems need only a URL to show a demo.

If a vendor sends you a file to test drive their software, you are not seeing 100% web-based software. The file either loads a client/server system on your desktop or is a complete "canned" demo.

Make sure to evaluate and test drive the software you're considering purchasing. When choosing between client/server and web-based, make sure the functionality is comparable.



Pricing, Terms & Conditions and Hosting

When obtaining software pricing information, the key is to get a detailed quote. Vendors seeking to entice prospects with low costs may only provide summary quotes. These summary quotes may not include features that are not a part of the core software (add-on modules), but may be needed by you for your specific issue tracking needs.

For example, a vendor may tell you that their software supports Active Directory (AD) integration, but when you receive a summary quote, it may only reflect the price of the core software only. You may find out later, after purchasing the software, that AD is one of their add-on modules. You will then need to purchase this add-on functionality, driving your price up much higher than you anticipated.

When requesting a price quote:

Specifically point out what you require, and make sure that what you saw in the demo is what will be quoted.

Ask for a price sheet that lists the vendors' full range of software and add-on modules, so as your needs change, you will not suffer from sticker-shock when it comes time to add more functionality/features.

Software that offers "standard," "professional," and "enterprise" versions can be very confusing and it is difficult to tell what features you are getting. Many vendors offer multiple versions but only have a single demo: How do you know exactly what you are getting? Choose incorrectly and your budget takes another hit to upgrade to the "better" version.

Make sure you understand how the vendors structure their pricing. Are they offering concurrent licenses or named users? Are licenses purchased in bundles or offered individually? Are there price breaks for quantity purchases and if so, what levels are offered?

In addition, always ask for a money-back guarantee. If what you install is different than what you thought you purchased, any reputable vendor should either solve the problem or be happy to refund your money.

Understand What a License Buys

The vendor should explain exactly what a license buys. What can a licensed user do and not do? Do you need a license for everyone that needs to use the product? If you purchase 100 licenses, does that mean that only the first 100 people in your organization can access the product before you need to purchase more? Some vendors only license the technical or support staff and allow unlimited usage by others. Make sure the vendor explains their licensing clearly so you can fit your needs to their offerings.

Hosted Applications

If you're evaluating hosted applications, make sure to compare the license models offered. The hosted offerings may be different than software installed on your servers.

Make sure you understand the exact terms of the hosted contract. Are you locked in for a set time frame, such as a year, or can you terminate the agreement at any time? If the agreement is terminated, can you have your

data? On many hosted applications, the data is owned by the hosting company and will not be provided to you in case you decide to end your association. This will leave you with a hole in your support history and you may lose valuable information. It's important to bring this up with the vendor representatives and understand who owns the data.

Also make sure that you're provided information on data security and the downtime statistics from their hosting facility. This gives you a good understanding of their reliability and safety. Find out about maintenance, when it's performed and the type done. Understand the company's backup policies and find out how long it would take to restore your system should data become lost or corrupted.

Customer Support and Training

Support options may generate confusion so have them thoroughly explained so you understand the terms.

Vendors may offer multiple support options that are based on per incident or per year. They may also offer different service levels to allow you to choose the support level that works best for your company. Often the support options are related to the number of licenses purchased and may vary across providers.

Make sure that support is available when you need it, 24 hours a day, 365 days a year.

Support options may also be included a part of a subscription offering. These offerings usually bundle services, such as ability to get upgrades and new versions with unlimited support under one price.

No matter what provider and support option you choose, the quality of the support service is very important. If the company has a bad reputation for service, then very likely you won't be happy with their products. You want a product that accomplishes your goals with both a support and service staff that provides outstanding service to you, should you need it. The best way to find this out is to ask for references and support survey results. A company with good support will be happy to provide the information and may offer it as part of their sales pitch. You may also see if a user forum exists so you can read comments from their customers and get an idea of what type of service you will receive once the purchase is made.

Training is an important part of the implementation of any good software product. Have the vendor give you a list of available training options. Make sure you understand the cost involved. Some companies now offer video training options. See if you can preview them ahead of time to gain understanding of the quality of the videos as well as gauge the company's teaching techniques.

If possible, consider onsite training offered by most companies. This would be a good option for you to get more detailed training and configuration assistance.

Another consideration is the availability of training or support assistance if you decide to run an evaluation copy of the software. Support and training at this point gives you an insight on what to expect after you make your purchase.

Product Development, Releases and Packaging

Discuss the release history with the vendor to get an idea of how quickly they add new features and improvements to their software. A consistent release history can mean the vendor is improving their product and will provide value to maintaining subscription and support contracts. Get a copy of the vendor's road map for future releases and see the approximate time. This is important information to have as you consider a new issue tracking package.

Ask the vendor if new releases are included in your support or subscription contract. Releases that are not included in your support or subscription contract may incur large costs to you in the future.

You also need to understand how the software is packaged. Some products are all in one, so you cannot pick and choose which features are enabled in the software. This can provide major confusion if you do not need all of the capabilities. Some packages are purchased as a core system and additional modules. In this case you pay for the base product that provides all the basic features, but may not include major functionality such as email conversion, LDAP integration, or asset management capabilities. This type of packaging provides you with the benefit of picking and choosing which features to invest your dollars in. Also make sure that any module you purchase is fully integrated with the software.

Expandability and Scalability

Today's company of 50 employees can very easily be tomorrow's company of thousands. Any package purchased today needs to be flexible enough to handle any growth your company may have in the near future. Expansion can affect your decision in several ways.

Users – As your company grows it expands its user base and as a result your support staff grows to continue to provide assistance. This requires that any software package purchased must have a flexible way to expand licensed users.

Scalability – The package purchased today must be able to handle the work load of the future. While you may only currently be handling 50 tickets a day, your software must be able to handle more than just that minimum without needing to upgrade or change settings and yet still provide reliable service to your users.

Flexibility – Issue tracking can be a common need across multiple areas of a company. Finding a software package that offers you the flexibility to configure submission pages for multiple uses in multiple areas of a business will provide you with a powerful tool that can help your bottom line across many areas of the company you work for. Look for software that offers the ability to separate issues and the view of issues from service area to service area.

Vendor Reputation

Do your homework on the vendor you are selecting. The vendor reputation, customer base, and financial stability are all key factors in your decision to buy software. Ask yourself:

- Does the company have a solid financial base? Can they prove it to you?
- Are they for sale or have they been recently acquired? If they are for sale, why?



Can they provide customer satisfaction scores on support or training?
Can they provide references?
Are there other customers using the product in your industry?
What awards or recognition have they received?
Who are the vendor's customers?

Multiple Ways to Submit Issues

You may want your users to have multiple ways to submit and access their issues. Options like having someone submit the issue on another user's behalf, direct submission through a web portal, submission via email, submission via a mobile device or through a social media insert are all beginning to be offered by various vendors. Make sure your vendor supports the methods that are important to you.

Other Considerations

Sarbanes-Oxley or HIPAA

If Sarbanes-Oxley or HIPAA affect your industry, then it will probably affect your software selection as well. You need to understand how your software addresses these requirements.

Source Code

Is source code availability a factor? It provides significant protection should the vendor go bankrupt, and gives you the ability to modify the software to your exact requirements. Look for a vendor that offers source code for free and has extensive experience assisting customers in doing their own unique modifications while continuing to let the customer stay on the software upgrade path.

ITIL

The Information Technology Infrastructure Library provides a detailed list of recommended processes and procedures to operate a Help Desk. Any package you purchase should provide you with the capabilities to implement some of the recommended practices of ITIL. While some find that ITIL Certification is a must for any software purchase, others do not. Try to find a package that meets your company's needs and desired level of ITIL implementation.

Important Features that should be included in the Software

Configurable Email Notification

Email is an important part of the notification process in any software. Make sure the email settings are configurable so you control when email is sent. You should also be able to control the content of the email, so you can tailor the message for your company.

Customizable System Options

Look for packages that offer customization settings within the interface itself. This usually means the package is easier to configure. Some software packages are very complex and need the assistance of vendor personnel to install and configure the software for you. This can add expense to your purchase, but may be worthwhile to correctly configure and use the product you've selected.



User Management

Managing users is an important feature of any package. The availability of a large and diverse set of user permissions and abilities provides tremendous flexibility in how the users can work in the software. Some packages use groups to control permissions, allowing access control for many users at one time. Another important feature to look for is whether you can upload users directly into the database, saving valuable time. One such mechanism to do that is through integration with your existing Active Directory. Some products even offer the ability to connect to multiple domains, which may be important to your organization.

Reporting

The ability to report on the data entered into the site is just as important as the features that capture the data. A product should offer you a full range of pre-formatted reports as well as the ability to create your own reports, giving you the flexibility to provide powerful information to your management. Some products will offer the ability to schedule these reports to be delivered automatically, saving time and effort.

Mobile Access

Being able to access the software through a mobile device can provide a big benefit. Any mobile access should give you the ability to add, update or close issues, and potentially even access a Knowledge Base.

As with any business decision, doing your homework now pays dividends in the future. This document was created to help you with that homework in the hope that your decision leads you to more productive and profitable operations in the future. We also hope that this document introduces IssueTrak as a vendor to consider when making your software decision. If you find this document helpful, then you will find IssueTrak's staff and software just as helpful!