



ISSUETRAK 8.0

Release Date: Spring 2008

System Requirements:

- Free disk space for core installation/upgrade, 30 MB
- Pentium III Processor, 512 MB RAM
- Windows Operating System, version 2000 or 2003
- Microsoft SQL Server, version 7.0, 2000 or 2005
- Microsoft Internet Information Server (IIS), version 5.0 or above
- Internet Explorer Browser, version 6.0 or above OR Mozilla Firefox 2.0 or above

**IssueTrak does not require a dedicated server.

**IIS and SQL may reside on the same server or installed on separate servers.

Installation Notes: This release includes automated installation and upgrade routines. A newly formatted online help will guide you directly to content and user-specific product documentation, including access to a table of contents and full-text search capability.

Most notable new features...

Administration

Organizations/Users/Groups

- Restrict Issue Types, Sub Types and Quick Picks to particular organizations and/or groups
- Select user and/or group permissions in newly formatted add screen with more descriptive labels
- Grant certain users new *Add and Edit Special Table Records when Entering Issues* permission
- Grant certain users new *Organization Administrator* permission, letting them create and edit users and/or groups within their own organization without full *Can Administrate* permissions
- View user issue history directly from the user record
- View user assets directly from the user record

Auto Assignments

- Use new Follow the Sun capability to accommodate shifts within your workforce

Escalation Rules

- Change Substatus, Add Note and/or Close Issues within Escalation Rules, e.g. warn submitters their issues have outstanding responses required from them and will be closed if no response is received within a certain time period, close the issue if no subsequent response is received within the defined time interval, etc.

Issue Classes

- Group issues into broader Issue Classes such as general, incident or change request
- View the Dashboard and/or reports filtered by Issue Classes

Issue Types

- Restrict Issue Types, Sub Types and Quick Picks to particular organizations and/or groups

Password Policy

- Enhance security on resetting IssueTrak passwords by defining challenge questions

Recurring Issues

- Schedule bi-weekly Recurring Issues

System Settings

- Review email notifications from new list of sent items in View Email Log option
- Create user defined navigation links on the main menu with new Menu Options setting

Task Manager

- Notify users tasks have been assigned only when all prior dependent tasks have been completed
- Cancel remaining tasks when prompted after yes/no responses to tasks when appropriate
- Receive email notifications when outstanding tasks are cancelled
- Edit tasks directly from issues without opening the Task Manager

Calendar

- Search/filter with newly formatted List All screen and retain criteria when moving from page to page
- Restrict events viewed by users based on their user and organization permissions

Dashboard

- View open issues by next action and open issues by substatus as Dashboard modules
- View the column next action in any open issues list
- Filter output viewed by a user based on their group and organization permissions, e.g. issue type, etc.
- View legend for all symbols referenced in any open issues list

Knowledge Base

- Access new Knowledge Base home page, Quick Search, with enhanced search capabilities
- Allow anonymous search/view of public and organization non-specific Knowledge Base articles from the log in screen

Miscellaneous

- Email issues with all supporting attachments included
- Install/upgrade with automated installation and upgrade routines
- Access newly formatted help content and user-specific (Administrator/End) product documentation, including access to a table of contents and full-text search capability
- Enter longer descriptions/notes with increased character allowances
- Access standard links from newly formatted icons and displays, e.g. add new caller, history, details, help, search, reminders, etc.
- Populate user details and issue history, Screen Pops, by routing incoming calls through a URL

Projects

- Include estimated hours, actual hours, estimated budget, actual budget, percent complete, project status and project substatus on project records
- View high-level list of all projects on new Project Summary screen
- View detailed list of all projects including estimated hours, actual hours, variance in hours, estimated budget, actual budget, variance in budget, percent complete, project status and project substatus on new Project Summary screen

- Search/filter projects with new Quick Search on newly formatted List All screen
- Show/hide and export to Excel project members from newly formatted List All screen
- Add project-related issues directly from project records
- Add issue-related projects directly from Recurring Issues, Quick Picks, and Submit/Edit/Clone Issue screens
- View list of all associated issues on project records
- Create an email distribution list independent of project member list
- Control which users see the project field within an issue

Reports

- View and print full query and report criteria from new View Query/Report Definition link
- Run new summary reports Summary of Total Time Open by Organization and Summary of Total Time Open by User

Active Directory Module

- Allow users to reset their Active Directory password by defining challenge questions through IssueTrak

Asset Management Module

- Archive audit records when appropriate
- Attempt to match and assign assets to IssueTrak users automatically
- Edit asset records directly from the submit screen
- Control which users can see and select an asset within an issue
- Control which users can access and administrate asset management
- Use TrakPC within a 64-bit environment

Billing Module

- Support multiple service contracts for an organization
- Select which service contract applies to specific labor hours as they are entered within an issue
- Record labor hours and products as line items when entering labor hours directly to an issue
- View work order/invoices directly from an issue
- Retrieve line items, invoice and export with flexibility, e.g. date range, issue number or organization
- Review and print exports with enhanced display and output
- Export all products/services to Excel
- Search/filter products/services with new Quick Search on newly formatted List All screen
- Name your own export files

Incoming Email Module

- Engage SSL encryption when utilizing POP3
- Preserve messages when processing is complete

Remote Control Module

- Add Inter-Tel Linkivity for integrated Remote Control access