



## Implementing An Issue Management Solution

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Issue management means a lot of things to a lot of people. A quick search on Google will invoke definitions, descriptions, tips, software tools, and organizations all devoted to the term. Whether it's implementing formal issue management solutions for the first time, upgrading, or changing vendors, it's often a daunting task for any organization and one that requires proper planning, appropriate expectations, and obtainable goals. These are the steps tsaADVET, an engineering drawing management systems (EDMS) solutions provider, went through as they created a team to review and improve their own business processes.

tsaADVET was using 3 different software applications, each with its own database for elements of their core business: software bug and defect tracking, help desk ticketing, and support maintenance contract management. Although the three applications provided them with the ability to manage day to day tasks, they found they were spending an undue amount of effort and man hours manually writing scripts or implementing processes to utilize the three applications collectively. What they wanted was a solution that provided them a single point of storage, flexibility to grow with their needs, and a good balance of functionality and simplicity. A team was established lead by Alan Hope to develop an outline of goals, assess current software providers, and develop an integration strategy. They had more than a hundred potential choices with different feature sets, cost models, and implementation requirements. Ultimately they chose to move forward with IssueNet, a suite of issue management software products from Elsinore Technologies.

## Identifying the problem

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The issue at tsaADVET is a common one for many growing companies; legacy software applications were hindering business efficiency and progress. As companies grow so do their demands on the software they use. The applications that were perfect 5 years ago no longer mesh with the demands of today. The team at tsaADVET assessed the situation:

- They were working with three completely different applications each with its own database for information storage.
- The developer of one application had gone out of business creating a support and training gap for that solution.
- Teams were spending an exorbitant amount of time writing scripts and manually transferring data so the different divisions could affectively share information.

## Setting Goals

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One of the primary goals was to find a single software solution for all three business units. The solution would have to be flexible, provide customization, and most importantly, allow them to port over data and bring it online with minimal interruptions to their normal business processes.

**Flexible** – They needed something that would grow with their needs

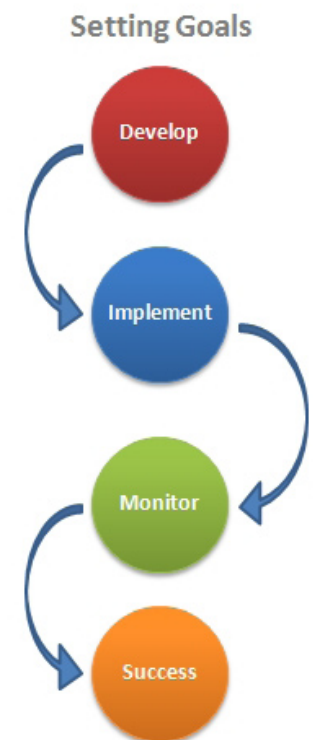
**Legacy Needs** – The information currently in the three databases was still critical to the business and would have to be ported over to the new solution

**Customizable** – A solution that could be molded to work with their already defined processes and provide structure for managing changes and creating new processes.

**Sustainable** – After going through the disbanding of one vendor they wanted to be sure that the next company they partnered with had a solid track record in the industry.

**Good partner** – Knowing their application needs were a bit different from the everyday user Alan and his team were looking for a partner that could react quickly and provide them with good support and training.

**Strong Return on Investment (ROI)** – The solution had to be cost effective, but with the required features and flexibility.



## Identifying Solutions

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After an extensive evaluation of different software vendors, Alan's team chose Elsinore Technologies. Specifically, they elected to implement the IssueNet Intercept and Assist solutions for software bug and defect tracking and help desk management respectively.

These IssueNet solutions are two variations of the base IssueNet platform designed to give customers a flexible and customizable framework for developing their own internal business processes. Each base IssueNet solution comes packaged with all of the core capabilities of IssueNet including the workflow designer, notification and form builders, rules engine, and a host of peripheral

tools such as the customer web portal Relay™ and analytics dashboard Insight™. When asked why he moved forward with IssueNet, Alan listed a few reasons for the decision.

- We can develop and test all of our workflows offline in a development workspace
- Training required was simple and straight forward
- The ability to eventually cascade the tool to other departments was interesting.

## **What Features Are Right For You?**

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There are a lot of good issue management solutions on the market, a quick search through Google or Wikipedia will generate a list longer than most people have time to read much less research. While there are similarities among them, there are features or design elements that speak to different people. It could be something about the software user interface (UI) that seems intuitive, its ability to integrate with other software applications quickly, or it has just the right balance of capability and simplicity for your organization. The team at tsaADVET after reviewing the software solutions and implementing IssueNet had a similar list of features that appealed to them.

### **CENTRAL DATABASE**

The fact that all the solutions could link back to one database was a key product feature identified by tsaADVET from the beginning. IssueNet provides the capability for a central SQL database that acts as a central depository for anyone utilizing the solution. IssueNet also provides the flexibility to implement multiple databases for more specific division requirements.

### **INTERFACE POINT WITH CUSTOMERS**

The web portal Relay is another tool used extensively at tsaADVET. The web portal provides customers with their own workspace. “Relay helped us get our arms around the helpdesk in a way to help customers that we just didn’t have before.” said Alan. With the combination of the web portal and IssueNet Assist, Alan and his team have provided customers with the capability to query results, track changes, and download software all from a central location.

### **SOFTWARE RELEASES**

There are always those after the fact concerns or ideas during a software implementation. For tsaADVET it was how to manage their software releases. “It wasn’t until after we had implemented the solution that we realized that we needed a better way to handle our software downloads for customers.” noted Alan. With IssueNet this wasn’t a problem. A small change to the software and tsaADVET was able to create rules to allow software downloads through a web portal and since IssueNet had access to service contracts it could determine which versions of the software should be available for each customer.

### **BETA AND CUSTOM SOFTWARE RELEASES**

Like a lot of software development companies, tsaADVET has some beta or customized code developed for a particular industry, customer, or to resolve a specific area of concern. Posting all these downloads in a single location is often confusing for the customer and creates a strain on development and support managing who gets which release. IssueNet allows companies to post custom applications or beta code at the same location as the other downloads but with custom filtering to denote which customers are qualified for that build. “This means no more throwing software onto different ftp sites, sending huge downloads over email, or manually handling the distribution of every beta or customized software download. This way you can keep all of your software in one place and simply filter who has access.” Sean White product manager IssueNet

## Implementation

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From a process perspective tsaADVET did some really good things during the implementation of the software. Probably one of the most impressive parts of the implementation was how they managed the business process flow and responsibilities. As they were developing the workflows each of the different department heads worked in conjunction to outline the way information and data should flow. More importantly they did so with an expectation that changes will be necessary and implemented a process to recommend changes as required. “If something is not working someone will send me an email or walk over and say hey this would be better if we did this. And then we plan and implement those changes.” noted Alan.

The way tsaADVET implemented the solutions was impressive. Most companies will spend an exorbitant amount of time implementing a process expecting it to never change. And in theory they are absolutely correct. Why should something that works now not work 6 or 12 months from now? But regardless of the planning something is overlooked or something changes that requires a modification. Planning for these changes and making it easy for business teams to interface or assist in the development of processes is critical to long term success.

*“Working with Elsinore has been a pleasure the level of support was outstanding. Even with functionality that we didn’t currently have they were always clear on when it will be fixed and how it would be fixed. It has been a very good experience” Alan Hope tsaADVET*

## Understanding the Benefits

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With any new software the goal is to improve productivity and ease the stress of mundane tasks on employees so they can engage in more fruitful labors such as working with customers, developing new ideas, and generating revenue. So how did IssueNet help tsaADVET achieve their goals and improve productivity?

The first big impact at tsaADVET was the consolidation of their service desk and their maintenance contracts. Now the service desk team can quickly link historical data for any customer with their current support contracts. This allows the help desk to quickly identify what software version customers are using, review historical issues/ interactions, and quickly assess a customer’s situation, software revisions, and other utilized products.

It also helps keep human error in check. “Before IssueNet if someone had forgotten to document something our processes would have started to break down, now we have developed those incidents into our workflows to send reminders and other notifications for delays in the process.” said Alan.

IssueNet provides a few ways to interface with colleagues and teams that are part of a business process. It integrates directly with Microsoft Outlook to allow email notifications to be sent from workflow events. It can also assign tasks to other IssueNet users directly placing tasks in their queue for completion.

## Measuring Results

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Typically the biggest but often most abstract method for measuring success is customer satisfaction. There are many ways to attempt some assessment of whether customers are happy such as surveys or questionnaires. But the most direct is just to ask them. “We just finished our annual user meeting in May where one of the points of interest and feedback was our new web portal for customers; the overall opinion is that it’s working out very well.” said Alan.



Since the installation of IssueNet and Relay tsaADVET noticed that it took customers a little time to warm up to the changes, but over time they have seen a 75% increase in traffic to their customer web portal , and customer input to tickets has increased 100%. Although the percentages vary, it is common to see productivity and satisfaction levels increase with the introduction of issue management solutions. Customers ultimately like the fact that they are being given more direct access to the decision makers and key personnel in an organization and employees like that they have tools that make their jobs easier and more efficient. One such productivity feature of IssueNet is the Outlook integration which provides users the capability to create issues inside Outlook. “The ability of IssueNet to interface with Outlook and create enhancement requests, bug notifications to development, or support requests directly from email was a huge help to us and probably improved our level of productivity 40%.” noted Alan.

## In Conclusion

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Although sometimes daunting, the implementation of an issue management solution is often a rewarding and cost efficient way of improving process productivity. tsaADVET is a great example of a company who had a clear plan of improving efficiency and customer satisfaction and executed to improve in both areas. Today they are utilizing IssueNet as part of their software development, help desk, and maintenance contract business strategies. What about moving forward? “We have plans to assist sales by providing access to relevant customer information inside IssueNet and we will eventually move our solutions to our hardware team to bring them under the same structure as our software teams”, says Alan Hope.

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## About tsaADVET

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tsaADVET provides complete EDMS (Engineering Drawing Management Systems) solutions for its clients. The foundation of its EDMS solutions is the Falcon/DMS® Engineering Document Management System, developed and marketed by the tsaADVET since 1987. The appropriate solution will vary according to the client's needs and will range from the design, assembly, and installation of CADD and networking systems to applications software development, its own utility software, network installation, and system and software training. The company's emphasis is on providing its customers with a total solution to their EDMS and IT requirements and on providing the pre- and post-sales technical consultation and support to ensure optimum performance of its products and services in the customers' facility.

## About Elsinore Technologies

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Elsinore Technologies has been an industry leader in issue management since 1995 with its initial launch of the flagship product Visual Intercept and more recently its successor IssueNet. IssueNet provides that missing piece of the business service management puzzle completing the connection between internal and end user tools with a solid enterprise level issue management solution. Our goal is to provide customers with capable, flexible, and yet simple tools they can use to manage their defect reporting, help desk ticketing, ITIL, or other issue management needs.

Over time a suite of solutions and supporting products have been developed such as Intercept, Oversight, Assist, Asterisk, Microsoft Outlook Integration, IssueNet Relay, IssueNet Insight, ScreenConnect, and a host of integrations and technology partnerships with other industry leaders.

## About IssueNet

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The IssueNet platform provides an extensible framework of tools and solutions to handle all issue management needs. Designed with an emphasis on customization, flexibility, and scalability, IssueNet has the infrastructure to grow with the changing needs and demands of today's organizations.

IssueNet works by providing users with a base set of tools, workflows, forms, and data mining utilities to assist with any issue management requirements. Customization to IssueNet is applied providing our four key solutions: Intercept, Assist, Oversight, and Asterisk. Each solution provides a customized version of IssueNet including workflow, user interface (UI), and terminology to fit specific industry needs. Each solution can be used independently or in conjunction with one another. Combined, the solutions work together seamlessly, even allowing all information to be maintained inside the same database.

