



Track-IT Suite Best Practices
Revision 1.0

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Revision History

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Track-IT Suite Best Practices

Audience and Context

This document is intended for use internally within DOVICO and is primarily targeted at Sales Representatives assisting clients and potential clients plan the configuration and use of Track-IT Suite. It is to be used as a guideline since the diversity of client circumstance/infrastructure may provide reason to deviate. Deviation from the guidelines related to installation configuration should be confirmed by Support and R&D.

Standard Installation

Setup entire Track-IT Suite, database and web components on a dedicated server, which meets optimal requirements that has a static connection to the Internet for web publishing. This will in turn enable Track-IT web edition for remote time entry.

Standard Use

Assignments

Assignments should be kept very specific to allow the software to run at peak performance. By assigning all projects/tasks to all employees the performance of the application could possibly decrease depending on the amount of Employees, Projects and Tasks.

To prevent this from occurring assign employees to only the Projects and Tasks that are applicable to those specific employees. The Quick Assign feature in Track-IT pro can be used to accelerate this process.

Archive

As excessive amounts of data begin to increase in Track-IT pro it is recommended that unused data be periodically archived from the database. This unused data includes projects/tasks that are finished and/or employees who have left the company. When this data is no longer needed on a regular basis for reporting, this data should be archived. Should the need arise to report on this historical data, reports can be printed from the archive database at any time.

Projects are usually archived after they are complete and the reporting cycle to which they apply is concluded. Employees, no longer using Track-IT, can be archived when all the projects to which they have time and expenses recorded have been or are to be archived. Tasks, no longer used by non-archived projects, can also be archived.

Backup

A scheduled backup plan should be created to ensure that your Track-IT Suite database is safe and recoverable in the event of a disaster. These Backups should be performed after regular business hours and can be automated by the Track-IT pro Assistant. It is recommended that at least one backup per week should be performed. It is further

recommended that a sequence of backups are maintained over a period appropriate to the client based upon their business cycle. For example, if a monthly business cycle, maybe four or five different sets of back up media to ensure that a problem encountered anywhere in the cycle which would require a restoration, can be recovered from.

A more comprehensive backup plan may be required for larger companies (100 or more employees). Because of the amount of data being tracked in an organization of this size it is necessary to perform several backups a week. In this case, if SQL Server were available it would benefit the organization as it can be configured to perform both Full backups (all information) and Incremental backups (only changed information). This will give the Track-IT Suite Administrator more flexibility in creating a more comprehensive backup plan.

Employee Leaves

When an employee leaves the company and will not be using the software any longer the license that is in use for this employee can be freed by setting the software uses for the employee record to none. (For more information, search for "Transfer licenses" in the Track-IT pro **Help, Contents and Index**). See Archive for additional information.

Project Ends

When a project ends it is recommended that the status of the project be set to Finished, Terminated or Rejected to prevent employees from tracking time against completed projects. (For more information search for "Projects View" in the Track-IT pro **Help, Contents and Index**). See Archive for additional information.

Time Entry Types

Employees can select from one or more of the following Track-IT timesheet entry tools for individual time and expense entry and reporting:

1. **Track-IT light** - used by employees to track time when the employee is directly connected to the network.
2. **Track-IT web edition** – used by employees to track time via the internet/intranet.
3. **Track-IT punch clock** – used in a large environment where many employees use the same computer to punch in when they arrive at work and punch out when they leave.
4. **Track-IT wireless** – used by employees to track time via the internet/intranet through all wireless Internet devices.
5. **Track-IT PDA** - used by employees to track time using a PALM handheld device.

Ideal data entry order

When entering data into Track-IT pro the data does not have to be entered in any particular order. Although due to the way the software is setup, it may help to enter it a certain way. The following is the recommended order in which data should be entered into Track-IT pro.

1. Regions
2. Clients
3. Overtime rules
4. Rates

5. Teams
6. Security Groups
7. Employees
8. Task Groups
9. Tasks
10. Project Groups
11. Projects
12. Expense Categories

Custom Terminology

Depending upon the company's usual project structure different terminology may be used. For example, a "Project" may be called an "Entity" or a "Task" may be called a "Job". In this case the terminology in Track-IT pro can be changed to better suite the company. The Custom Terminology can be changed under Database Options in Track-IT pro. (For more information, search for "Terminology" in the Track-IT pro **Help, Contents and Index**).

Security

Security can vary depending upon the organization's structure. It is not recommended to give all users Administrator security level access. It is recommended that the organization's structure be reviewed and an assessment be made to determine what each employee or team requires access to. The internal security groups may be sufficient to accommodate some organizations needs. However, if the internal security groups are not adequate, new security groups may need to be created. (For more information, search for "Internal Security Groups" and "Security Groups" in the Track-IT pro **Help, Contents and Index**).

Designating a Track-IT Administrator

The optimum Track-IT Suite Administrator is someone who will be a significant management tool (e.g. pro) user with an Information Technology background. If these traits are not available, then ability to follow instructions should be substituted for the information technology background. For very technically challenging installations, they should be supported within their installation by an appropriate Information Technology Professional. This individual should assist the Administrator with installations, roll-outs (if necessary) and upgrades.

If at all possible, the Track-IT Suite Administrator should also be the primary support contact for DOVICO. It is best for all other employees using Track-IT Suite to route any support questions or problems through the Administrator.

If practical within the organization, a backup Administrator should also be named to cover for the Administrator as required.