

site configuration

When setting up and configuring an Issuetrak site, the first thing to do is define the foundational building blocks of the site. The interaction between these building blocks ultimately determines the success of the installation. This document introduces the concepts behind the various entities and how they can be used.

The top portion of the Administration menu in Issuetrak contains a section of entities. Three of these entities will always appear: Organizations, Users and Groups. There are two optional entities called Departments and Locations that can be activated in the System Settings portion of the Administration menu. These are the structural backbone of Issuetrak, controlling access to Issues and other Users. They also provide reporting elements for management. Along with entities, the final building block is Issue Types. Issue Types are found further down in the Administration menu and provide the categorization elements for your individual Issues.

In describing the purpose of these individual entities, a few of assumptions will be made. First, the two optional entities of Departments and Locations are activated. Second, the default name of Location is still in use. In reality, these items function more as containers and can be repurposed to suit your needs and provide necessary reporting segmentations.

users

The most basic entity in Issuetrak is Users. Users are people who interact with the issues in any capacity. They may be designated as End Users or Agents. Some end users may never even log into the site. Each user has three entities that identify them. The first is the required entity of organization. Most often, this is the company that user works for or the main entity in the site. Users can be connected to a specific department within a company, and also be associated to a location to flag their specific physical location. All of these associations are made in the individual User record.

When the user submits an Issue, Issuetrak brings the associated values into the issue record. This provides the submitting organization, department and location. Adding the Issue Type gives the issue all the elements for proper reporting.

why is this important

Most users only have the ability to view their own issues and use the most basic features within Issuetrak; however other users need more advanced permissions or views. Group membership will grant specific permissions to multiple users at once, controlling what they can do or see on the issues they're allowed to view. Expanding access to give greater visibility to another user's information and issues is controlled by



department or organization association. This is discussed in more detail in the document "Best Practices – Visibility Controls."

Your site Administrator has the ultimate control over which optional building blocks are activated, in addition to how items are structured. However, here are some examples to give you an idea of how your site can be configured.

internal service desk

One department handles issues coming from multiple departments

- One Organization: your company
- Departments: use if tracking which departments are sending Issues
- Locations: use if you have multiple work locations

internal service desk / business operations

Multiple departments handle issues coming from multiple departments

- One Organization: your company
- Departments: track and report Issues by sending or receiving department
- Locations: use if you have multiple work locations

external customer service

One department handles customer service issues

- Multiple Organizations: your company, your customer's companies
- Departments: use if tracking which department is handling issues
- Locations: use if you have multiple work locations

external customer service

Multiple departments handle customer service issues

- Multiple Organizations: your company, your customer's companies
- Departments: track and report issues by receiving department
- Locations: use if you have multiple work locations

internal and external service desk / business operations

Multiple Departments send and handle requests, including customer service issues

- Multiple Organizations: your company, your customer's companies
- Departments: track and report Issues by sending or receiving department
- Locations: used if you and/or your customers have multiple work locations

