connector
Linking the Triaster community

Issue 11 // July / August 2013

Welcome

Emma Harris // Operations Director

A big thank you to everyone who sent feedback about the May/June edition. Encouraged by this, all at Triaster (and Josephine and Q) have been working very hard on this edition; I think you will agree that it has paid off.

We have revisited Thomson Reuters' Process Library implementation, to bring you up-to-date following our article last year on their initial very fast implementation. We have an article by Q Tucker, Fugro GEOS, on using Trac software and an article on WebLog Expert. We are very interested in the trends and behaviours you have uncovered as a result of your Library usage tracking. Please go to www.triaster.co.uk/connector and click on 'Connect' to tell us about them.

There is a reminder of the benefits included in Triaster Trusted Partner Agreements as standard and also of Triaster services. There is an article on reporting for ISO 9001, ISO 14001 and OHSAS 18001, T.U.G. News, Tech News, an article on new features driving improvement which should not be missed, all the other usual articles and the eagerly awaited part two of Mike's considerations of return on investment from Quality Management.

And don't miss the competition!

Do enjoy and if you do (or don't), please let us know – it will encourage us even more for the next one.

Emma Harris

emma.harris@triaster.co.uk
+44 (0)870 402 1234

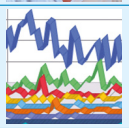
In this issue//

Thomson Reuters
Establishing an operating rhythm.

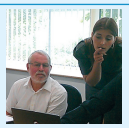
Page 2

Recommending Trac
Q Tucker, explains how using Trac software benefits Fugro GEOS.

Page 5

WebLog Expert
Getting the most from it – part one.

Page 7

T.U.G. (Triaster User Group) News
Education User Group survey feedback.
Page 9

Triaster Software Development
New features driving improvement.

Page 11

Triaster Reports
Reporting for ISO 9001, ISO 14001 and OHSAS 18001.

Page 16

How can we help you?
A reminder of Triaster services.
Page 18

Triaster Trusted Partner Agreements
A reminder of the benefits included as standard.

Page 21

Tech News
Settings.xml and Approvals Configurations.
Page 24

Meet…Ash Jayapaul
Triaster's Technical Support Administrator.

Page 26

Community Events
Keeping you up-to-date.
Page 27

From the Community
New competition!
Page 29

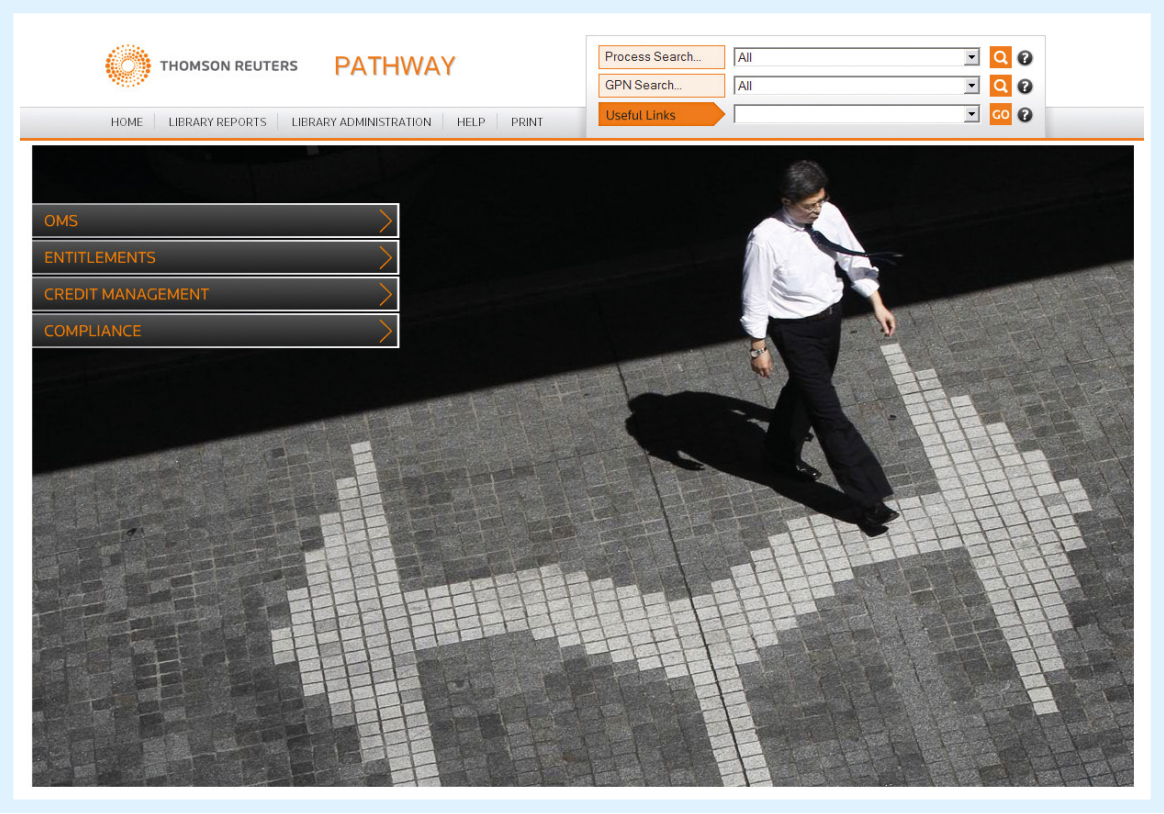
Return on Investment (ROI) from Quality Management
Part two.

Page 31

Thomson Reuters

Establishing an operating rhythm

The January/February 2012 Connector included an article about Thomson Reuters' Go Live of 'Pathway' in just three months.



The project to implement a Business Process Management tool had four key objectives:

1. For all Customer Administration processes to be in one format and one searchable location.
2. To provide a solution that has up-to-date process material that can be trusted as the source of truth.
3. To communicate any changes to a process or the addition of new processes in a consistent manner.
4. To provide the ability to search for other key order processing materials, all in one place.

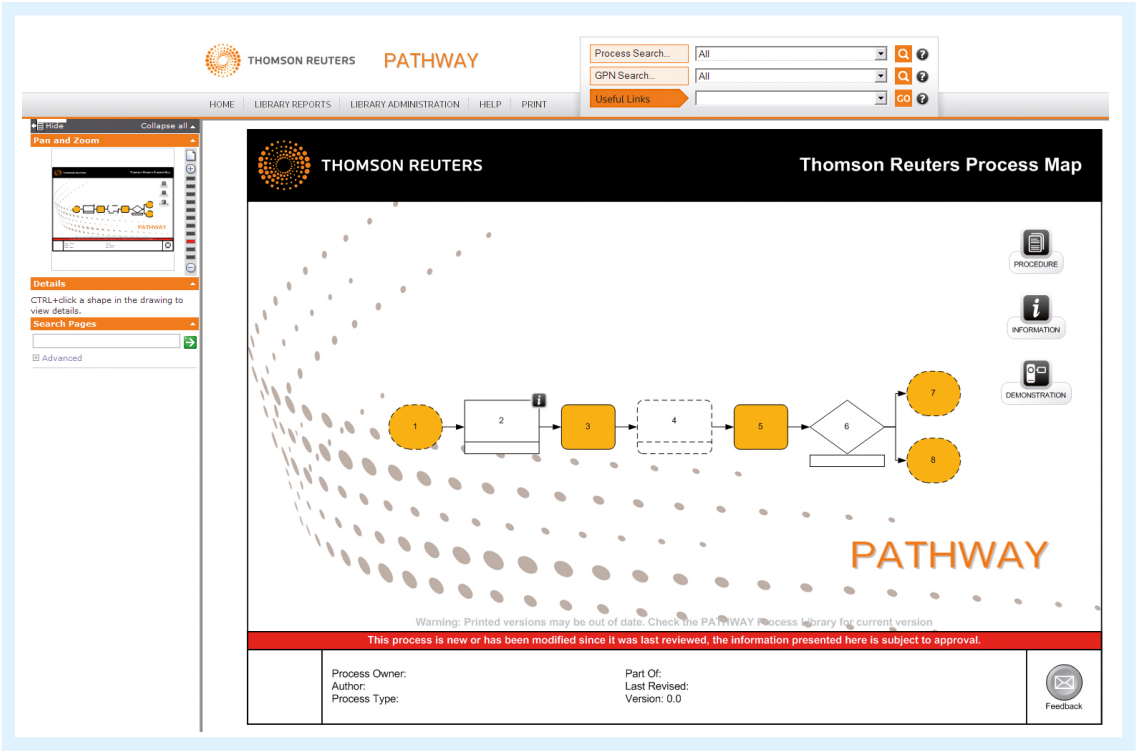
The scope of the implementation also included the capture and re-engineering of 50 of the most commonly used corporate processes, so Go Live in three months was quite a challenge! It was achieved however and supported by a great communication programme, Pathway was launched on 30th November 2011.

A couple of months later, responsibility for Pathway was passed to Josephine McDonald, Business Process Consultant, whose remit was to ensure that Pathway deliverables were embedded as business-as-usual, or as Josephine eloquently expressed it, 'to establish an operating rhythm.'

Josephine, who is PRINCE2 certified and has extensive practical experience in Business Analysis, focused on taking Pathway to the next level. The biggest challenge was the embedding of Pathway as an on-going source of process information, that all users know and trust.

Josephine was clear that after the initial interest generated by the Pathway launch, the way to establish this trust was by ensuring that users could find accurate and useful process material that met their operational needs. The approach adopted was:

- To establish Pathway methodology with the Process Team. This was achieved through training existing staff and establishing support materials for future starters. So that they could ensure that Pathway content remained accurate whilst continuing to increase in scope, establishing process capture in a consistent format on an on-going basis was essential.
- To reach out for formal feedback from the user community to verify that content was meeting their operational needs.

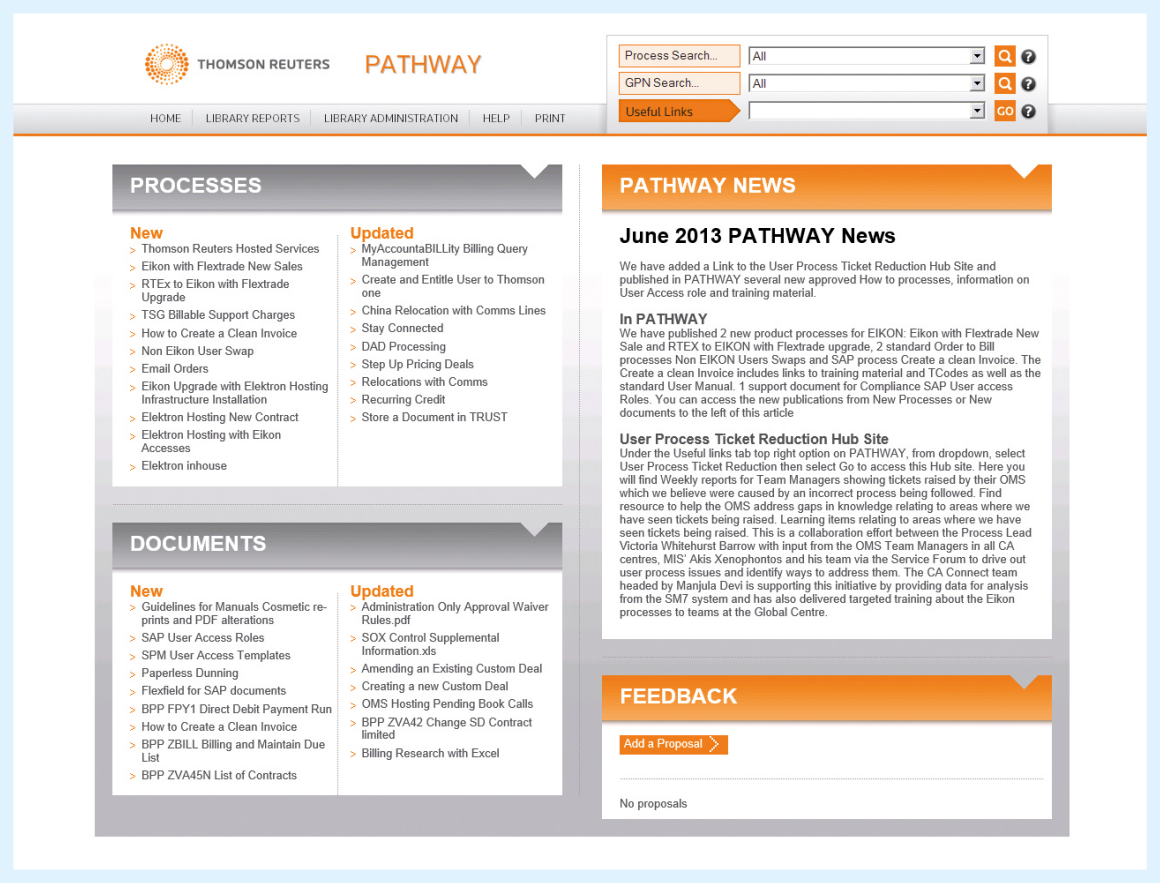


Accordingly, she surveyed the 1500 users of Pathway to find out the processes that they were finding most challenging and those that they felt were not working and needed to be fixed as a priority because, for example, they were impacting negatively on their clients. The answers to this survey established:

- The priority of new content mapped for Pathway, ensuring that even as content was being captured, Pathway contained the information that users valued most.
- The identification of additional links to information points.

In order to establish a formal process for communicating new or changed processes, a bespoke News Page was developed for Pathway. The News Page is a menu option from the Pathway toolbar and users have quickly come to know that this is where they go for a summary of the latest processes and

documents, which are either newly published to Pathway or have been updated. There is also a Pathway News section, where Josephine can publish 'newsletter' information to users, keeping them updated on what's been happening and what's coming next. This includes updates on events and deliverables from other in-house service providers, such as, 'Training'. The News Page means such updates no longer have to be e-mailed to all 1500 users. Also everyone knows this is where they go for the latest information. It does not replace user training, where for example a process has been re-engineered, but is an accurate summary of what's new and what's changed and provides an interactive area where Library users can communicate with Library Administrators.



Keeping the initial objectives clearly in mind, Josephine has very successfully established an operating rhythm for Pathway. This is just as important as the initial push to get to Go Live and the only way to embed a Business Process Management system as a trusted source of truth. She believes that the News Page is a key element of this, as it has made Pathway even more **useful**, **usable** and **used**.

We at Triaster can only agree.

If you are interested in making your Process Library even more useful, usable and used with a News Page, contact Carma Cooper or Victoria Glancy by calling +44 (0)870 402 1234 or e-mailing carma.cooper@triaster.co.uk or victoria.glancy@triaster.co.uk

Recommending Trac

Q Tucker, explains how using Trac software benefits Fugro GEOS

Q Tucker // Library Administrator, Fugro GEOS

What is Trac?

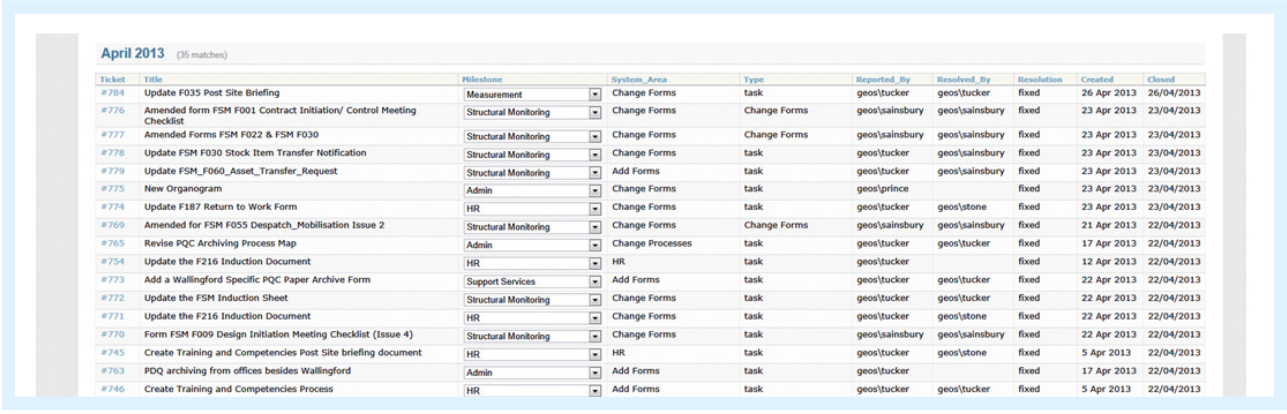
Trac is a software package which excels at tracking the progress of pretty much anything. Fugro GEOS started looking at it as a way to track software iterations; however it soon became obvious that its incredible flexibility lent it to other tasks.

How does a Library Administrator benefit from using it?

I started using Trac as a method of tracking our process map and document updates and we've now reached 830 tickets in just over a year. Obviously the Triaster software is very good at recording the map version, however Trac allows me to have interaction with our various 'customers' during new/updates to mapping and documentation.

How does Trac work?

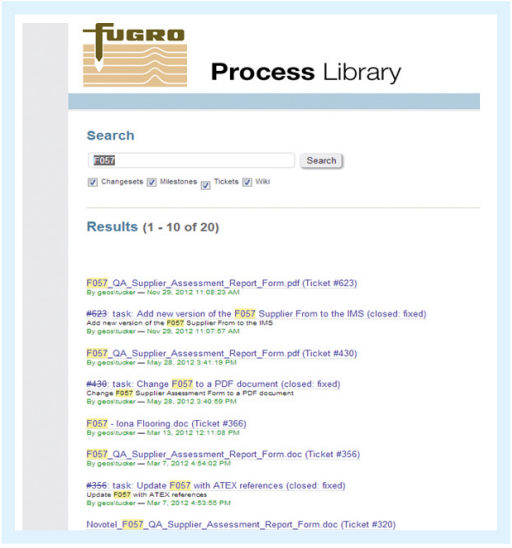
It sits on our intranet and can be accessed by all of our employees. When a map or document changes, or needs creating, I am sent a new ticket which they can follow, interact with, add documents to and approve closure. The use of milestones, resolution dates, types of requirements, etc, all available through drop downs, makes compiling a ticket a simple process even if folk have not used Trac before.



April 2013 (35 matches)

Ticket	Title	Milestone	System_Area	Type	Reported_By	Resolved_By	Resolution	Created	Closed
#784	Update F035 Post Site Briefing	Measurement	Change Forms	task	geos\tucker	geos\tucker	fixed	26 Apr 2013	26/04/2013
#776	Amended form FSM F001 Contract Initiation/ Control Meeting Checklist	Structural Monitoring	Change Forms	Change Forms	geos\sainsbury	geos\sainsbury	fixed	23 Apr 2013	23/04/2013
#777	Amended Forms FSM F022 & FSM F030	Structural Monitoring	Change Forms	Change Forms	geos\sainsbury	geos\sainsbury	fixed	23 Apr 2013	23/04/2013
#778	Update FSM F030 Stock Item Transfer Notification	Structural Monitoring	Change Forms	task	geos\tucker	geos\sainsbury	fixed	23 Apr 2013	23/04/2013
#779	Update FSM_F060_Asset_Transfer_Request	Structural Monitoring	Add Forms	task	geos\tucker	geos\sainsbury	fixed	23 Apr 2013	23/04/2013
#775	New Organogram	Admin	Change Forms	task	geos\prince		fixed	23 Apr 2013	23/04/2013
#774	Update F187 Return to Work Form	HR	Change Forms	task	geos\tucker	geos\stone	fixed	23 Apr 2013	23/04/2013
#769	Amended for FSM F055 Despatch_Mobilisation Issue 2	Structural Monitoring	Change Forms	Change Forms	geos\sainsbury	geos\sainsbury	fixed	21 Apr 2013	22/04/2013
#765	Revise PQC Archiving Process Map	Admin	Change Processes	task	geos\tucker	geos\tucker	fixed	17 Apr 2013	22/04/2013
#754	Update the F216 Induction Document	HR	HR	task	geos\tucker		fixed	12 Apr 2013	22/04/2013
#773	Add a Wallingford Specific PQC Paper Archive Form	Support Services	Add Forms	task	geos\tucker	geos\tucker	fixed	22 Apr 2013	22/04/2013
#772	Update the FSM Induction Sheet	Structural Monitoring	Change Forms	task	geos\tucker	geos\tucker	fixed	22 Apr 2013	22/04/2013
#771	Update the F216 Induction Document	HR	Change Forms	task	geos\tucker	geos\stone	fixed	22 Apr 2013	22/04/2013
#770	Form FSM F009 Design Initiation Meeting Checklist (Issue 4)	Structural Monitoring	Change Forms	task	geos\sainsbury	geos\sainsbury	fixed	22 Apr 2013	22/04/2013
#745	Create Training and Competencies Post Site briefing document	HR	HR	task	geos\tucker	geos\stone	fixed	5 Apr 2013	22/04/2013
#763	PDQ archiving from offices besides Wallingford	Admin	Add Forms	task	geos\tucker		fixed	17 Apr 2013	22/04/2013
#746	Create Training and Competencies Process	HR	Add Forms	task	geos\tucker	geos\tucker	fixed	5 Apr 2013	22/04/2013

The search system will find anything, and I mean anything, so it can be used for technical information. I can search for a form number and its entire history will appear in one screen.



FUGRO Process Library

Search

F057 Search

Changesets Milestones Tickets Wiki

Results (1 - 10 of 20)

F057_QA_Supplier_Assessment_Report_Form.pdf (Ticket #623)
By geos\tucker — Nov 29, 2012 11:08:23 AM

#623: task: Add new version of the F057 Supplier From to the IMS (closed: fixed)
Add new version of the F057 Supplier From to the IMS
By geos\tucker — Nov 29, 2012 11:07:57 AM

F057_QA_Supplier_Assessment_Report_Form.pdf (Ticket #430)
By geos\tucker — May 28, 2012 3:41:19 PM

#430: task: Change F057 to a PDF document (closed: fixed)
Change F057 Supplier Assessment Form to a PDF document
By geos\tucker — May 28, 2012 3:40:59 PM

F057 - Iona Flooring.doc (Ticket #366)
By geos\tucker — Mar 13, 2012 12:11:08 PM

F057_QA_Supplier_Assessment_Report_Form.doc (Ticket #356)
By geos\tucker — Mar 7, 2012 4:54:02 PM

#356: task: Update F057 with ATEX references (closed: fixed)
Update F057 with ATEX references
By geos\tucker — Mar 7, 2012 4:53:55 PM

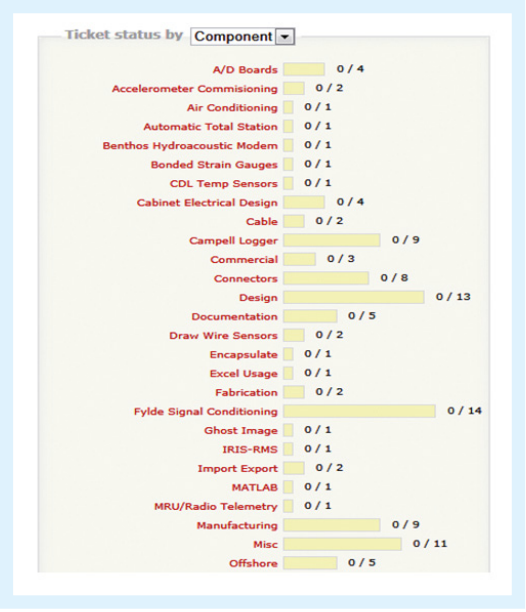
Novatel_F057_QA_Supplier_Assessment_Report_Form.doc (Ticket #320)

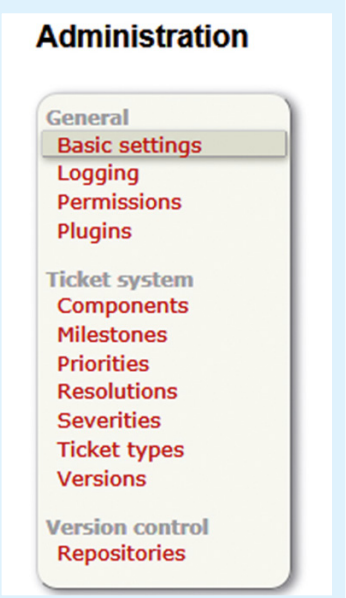
How technical is Trac?

We used one of our project guys to install it, in addition he will update and attach the many 'plug-ins' that are available. It seems to be pretty simple to install on a server. The user and administrator interface is as simple as I have ever seen. Adding a name into a field and ticking a box (reversing this for removal) compiles the entire drop down information.

What if another system is already is use?

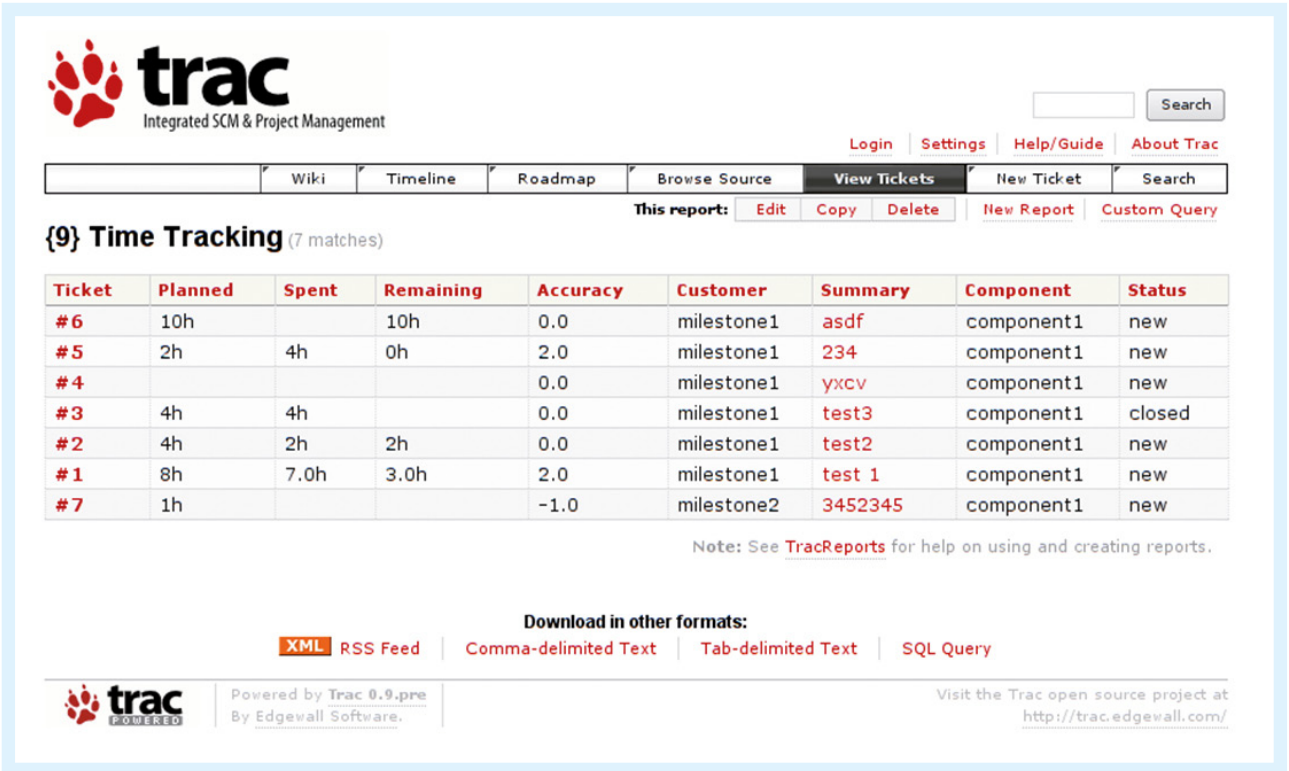
I was asked to look at Trac as an alternative to Microsoft Access. Given my hatred of typing and the volume of information, I was forced to read instructions (it seems these can be useful). Trac has a plug-in that allows .csv files to be uploaded and fortunately you can export from Access in this format. In about two hours I was able to add all of the old database information into Trac. About 4 years' worth of information and 400 tickets, all allocated to their original tags.





What else does Trac do?

Timing and estimation (a plug-in), Gantt charts, hours reporting (very useful if you charge for time or need to record hours for project reasons) stopwatch when working on tickets, calendar view, link to Microsoft Outlook and much more.



There is the possibility that Microsoft SharePoint may be coming into our lives at GEOS soon, so this might replace some of the benefits of Trac for us. However given its unique set of features it will always be useful.

I thoroughly recommend it. And it's free! http://trac.edgewall.org/

WebLog Expert

Steve Odeyemi explains how to get the best out of WebLog Expert – part one

Steve Odeyemi // Product Suport Consultant

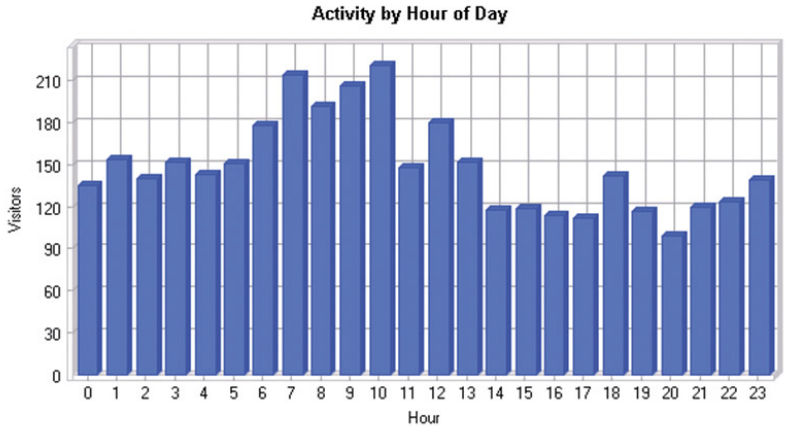
WebLog Expert was first featured in our March/April 2012 issue, when Q Tucker explained how Fugro Geos were using WebLog Expert to enable them to analyse the way their Process Library was being used. Since then Triaster has introduced WebLog Expert as a standard element of our Process Library implementation.

This is the first of a two part article examining WebLog Expert reports in detail (Standard edition) and how they can be most useful.

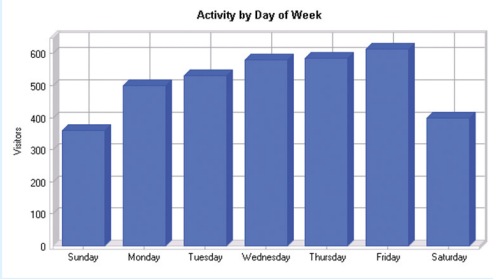
The Standard edition captures the analytical data required by most Managers or Library Administrators. Reports are produced in pdf, cvs and html formats.

The initial set of data that most Managers or Library Administrators want to capture is found under the Activity Statistics menu. From here Managers can view activities by hour of day, daily, by days of week, week and month. Within this data capture are the number of library site hits, pages viewed, visits and importantly the average length of time of visits. The latter combined with 'Activity by hours of the day' data may be an interesting indicator to show end user behaviour. Below are some sample reports:

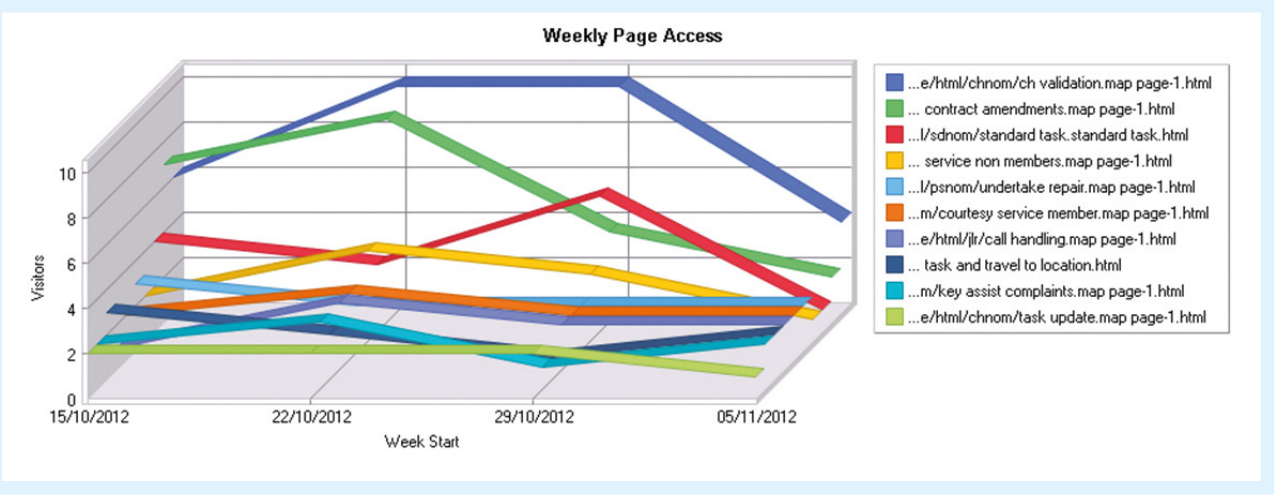
Date	Hits	Page Views	Visitors	Average Visit Length	Bandwidth (KB)
Sat 12/08/2007	3,306	485	399	01:26	64,767
Sun 12/09/2007	3,065	490	361	01:40	51,544
Mon 12/10/2007	4,301	583	500	02:02	84,284
Tue 12/11/2007	4,243	599	532	01:24	100,983
Wed 12/12/2007	4,897	759	579	01:35	86,360
Thu 12/13/2007	4,893	714	585	01:45	105,799
Fri 12/14/2007	5,769	805	614	01:23	87,362
Total	**30,474**	**4,435**	**3,570**	**01:36**	**581,103**



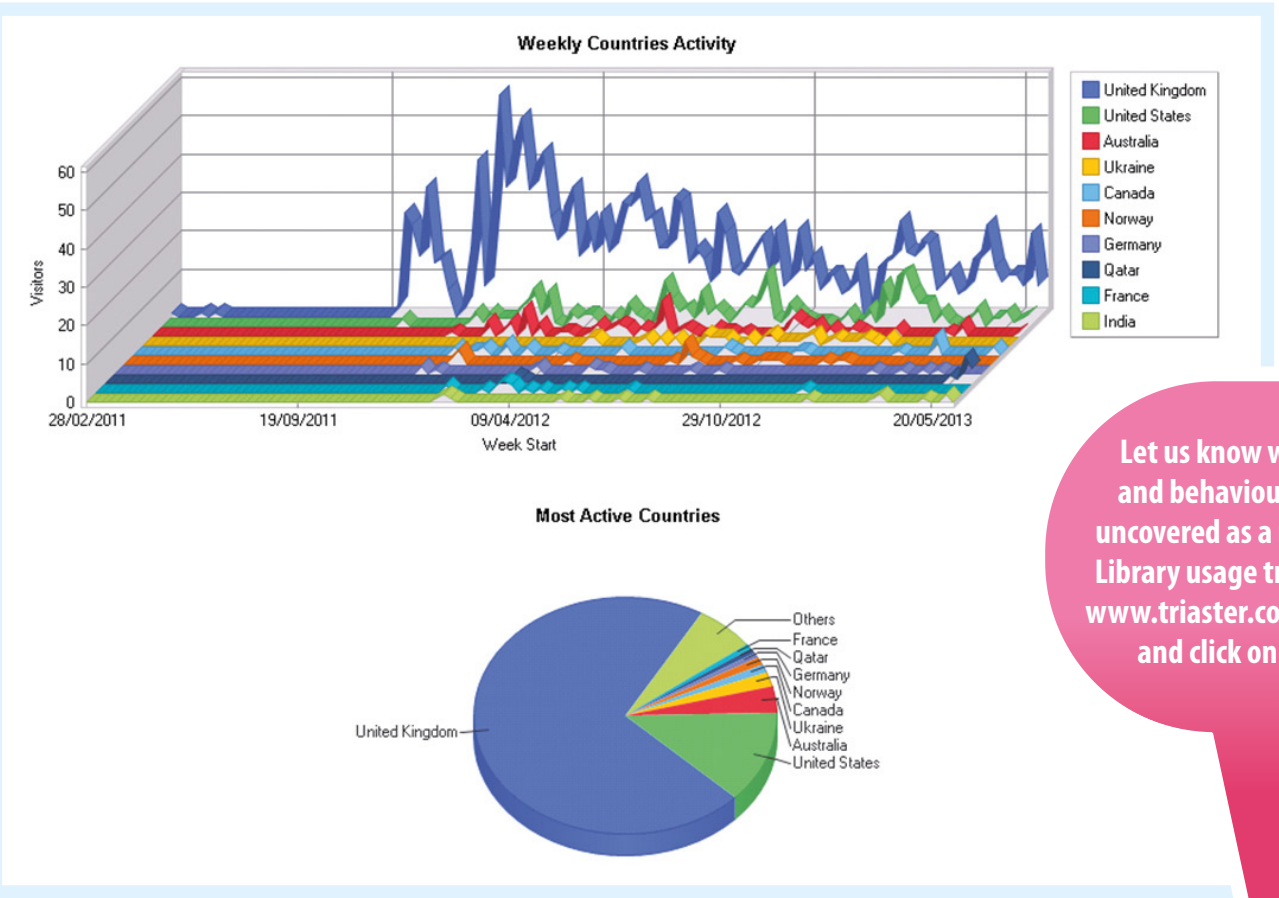
From the charts above, we can ask what process maps are employees viewing between 7am and 10am on Friday? The answer could be that employees use this period to fill in their expense claims. However, we can check this deduction by viewing the 'Access Statistics' which captures process map pages, downloaded files and images that were accessed at these times. In the example, the weekly Page Access report below informs us that process maps



relating to validation are viewed most, followed by contract amendments.



The data above shows a positive uptake by staff, by the end of October, of what may have been an implementation of a new validation processes (blue). We may deduce that staff being able to use relevant process maps, has had a positive effect on the drawing up or issuing of contracts, which are better tailored to meet customers' needs. As a result, the department requires fewer contract amendments, shown in green. In addition, global organisations can view site activity access by country, as shown below:



Let us know what trends and behaviours you have uncovered as a result of your Library usage tracking. Go to www.triaster.co.uk/connector and click on 'Connect'.

In part two we will look at an example of Top Entry Page and Top Exit Page data analysis.

T.U.G. News

Linda Spinks presents the latest news from the User Group

Linda Spinks // User Group Chairperson

User Group

WE TELL YOU

The next User Group meeting will be hosted by 3663 at their Manchester site in Salford, on 9th October 2013.

A reminder that space is usually limited for these events because rooms at most organisations that are kind enough to host a User Group meeting, can only seat a limited number. Accordingly we ask that each organisation is represented by one person only, to ensure the maximum number of customers can attend each meeting. If you would like to attend the next meeting, please book on via the website here: www.triaster.co.uk/events

For reference, the minutes from the last meeting, which was hosted by Openfield in March, along with presentation slides and the current Product Roadmap can all be found via the User Group Secure page at: www.triaster.co.uk/usergroup/

Please e-mail customer.services@triaster.co.uk if you need a reminder of the username and password to access this area.

Also, please do remember that if you have any general questions that you'd like to ask other Triaster users, the User Group Forum on LinkedIn is the ideal place for this. The more people who use it the more useful it will become. This forum can be both clicked to from the User Groups Secure page and via this link: www.tinyurl.com/User-Group-Forum

If you aren't already a member of this group, please simply request to join and the group owners will approve your request.

Openfield hosted the last User Group in Spring this year.

Education Group

The date and location for the next Education User Group meeting is yet to be agreed.

Feedback from the group members following the survey sent out back in March has now been collated. This included questions regarding the most suitable way forward in terms of meetings and sharing information.

The feedback suggests that we should plan for a single Education Group meeting each year, with an emphasis on as many people attending as possible. We will try to ensure that the meeting alternates between northern and southern locations where possible, so that travel time/cost are as fair as possible.

Laura Withers from Kent University has offered to set up and administer an e-mail forum for education users, which can only be set up and joined by people with @ xxxx.ac.uk e-mail addresses. However there is already a group forum set up on LinkedIn, so it will be important to decide on one place to go, rather than a choice of places, in order to avoid diluting the content.
If you would like to offer to host a meeting please drop us an e-mail with some suggested dates to user.group@triaster.co.uk

YOU TELL US

Send us your feeback
Please do get involved and feedback to Triaster with your Feature Requests, thoughts about the Feature Prioritisation discussion (see the article on page 14) and following Focus Days. This is our opportunity to shape the future development of the Triaster Solution. The more customers that feed into these sessions, the more accurate the reflection of our collective requirements will be.

Feature Requests should be e-mailed with a description of required functionality and perceived benefit to: featurerequests@triaster.co.uk

LIVE FROM LINKEDIN

We are currently implementing a new process library that will when we go live in July contain around 400 maps and a similar number of linked documents. We also require multiple approvals so have an additional site (Landscape) where the approvals will take place. Can anyone give me some idea about how much time is spent in your own companies undertaking process library administration?

To view the rest of the question, the responses given and to comment on your experiences please go to:

www.tinyurl.com/Linkedin-Library-admin

The next User Group meeting will be hosted by 3663, Manchester on 9th October 2013.

Triaster Software Development

News on new functionality coming soon, events and future plans

Andrew Ridgeley // Senior Software Engineer

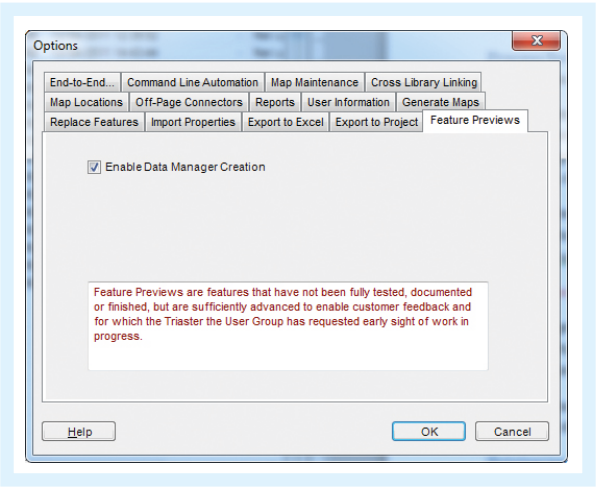
New features coming soon to drive improvement

Process Navigator

We've had a pretty major re-think and improvement of the Data Manager concept in 13.3.

The new Data Manager is a full synchronisation engine, enabling field-level updates of properties in Visio and Excel. We are releasing it in 13.3 as a Feature Preview. Feature Previews are first releases that are targeted at expert users in order to enable expert assessment of the capability and the user interface to it. Feature Previews are well tested but may be light on end user documentation.

The Data Manager must be switched on in Tools > Options > Feature Previews, which then enables the new Data Manager menu. From there it is straightforward to create or edit a Data Manager and to trigger a synchronise.



Data Managers can be automatically synchronised on publish, and the same Data Manager can update multiple libraries so for example Live and Pre-Live can by kept in sync automatically from the same Data Manager. It can be thought of as a much improved 'Import Properties'.

The Data Manager is one of several core, fundamental capabilities in the Triaster Solution that collectively deliver on the four major business needs of process: Capture, Share, Use and Improve.

Driving improvement

For most of the last decade, Triaster R & D has steadily progressed through the first three of these stages (Capture, Share and Use). We are now delivering significant capabilities in the fourth area of 'Improve'. Data Manager will therefore be most useful to customers that already have existing implementations in place and now want to surface, enable and drive process improvement.

In terms of driving improvement, Data Manager is best understood in the context of eight other core capabilities:

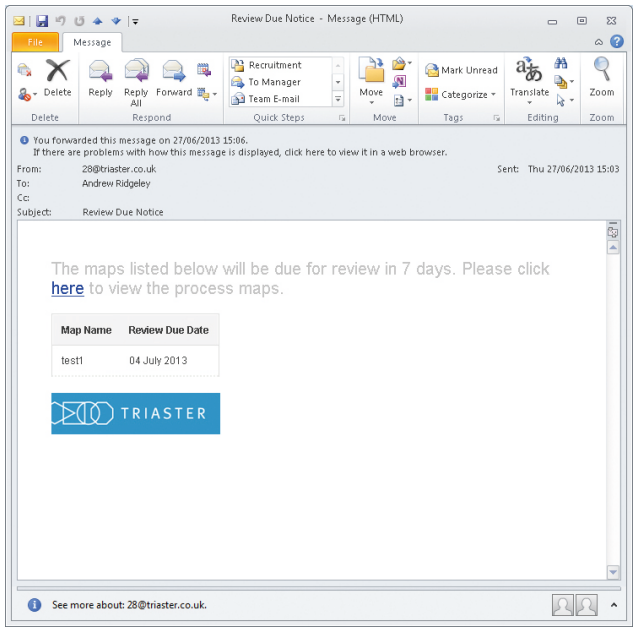
1. Report Exchange (already released)
2. Data Visualisation (already released)
3. Alerts (already released)
4. Data Manager (13.3)

5. Process Simulation (13.4)
6. Automated Data Aggregation (13.4)
7. Real-time Publishing (during 2013)
8. Mobile access (in planning)

Here's an example of how some of these things fit together …

An organisation has adopted a policy of zero accidents in the workplace. A site supervisor working in the field has encountered a flaw in a process that could lead to an accident when working at heights – there is no double-checking of the safety harnesses. Using the Data Manager for the Process, the site supervisor opens Excel, sets the risk level to High for the process, and adds a comment as an Improvement Opportunity.

The Real-time Publication Server sees the Data Manager has changed, so it synchronises the new data values with the process maps and then loads the affected process and publishes it. Using the Data Visualisation capability, the process map now displays a red warning triangle against Safety Harness Sign-off. E-mail alerts are sent to all people and business areas to whom this information is relevant.



Software Development Events

Customer Focus Day

The next Customer Focus Day is taking place on 11th July, at our Wallingford Offices. Sessions will cover:

- **User feedback on Server Configuration Settings and Alerts and Approvals**
- **BPML/BPMN, Data Manager and brainstorming Simulation**
- **Self-upgrading post 13.1**
- **Updated Product Roadmap, following the on-line feature prioritisation discussion held on 11th June**

For more details and to register for these events please go to www.triaster.co.uk/events. Please book early to avoid disappointment!

There are still places available so if you would like to attend, please either complete the form found at www.triaster.co.uk/events or contact Jo Dolton by calling +44 (0)870 402 1234 or by e-mail to jo.dolton@triaster.co.uk

Release Update Webinars

The next Release Update Webinars is on 25th July 2013 at 10 a.m. to 11 a.m. GMT.

Maximising the use of your latest upgrade

If your Library has been upgraded to Server 11 or above, do come along to this free workshop. The next one is being run on 5th September at our Wallingford Offices. It is a very practical workshop covering all the new Server 11 configuration options and how they may best support your objectives.

> ...great for understanding the new features, most useful and well presented as always. *Xtrac Ltd*

> An excellent way of learning about maximising your Triaster upgrade. *Fugro Geos*

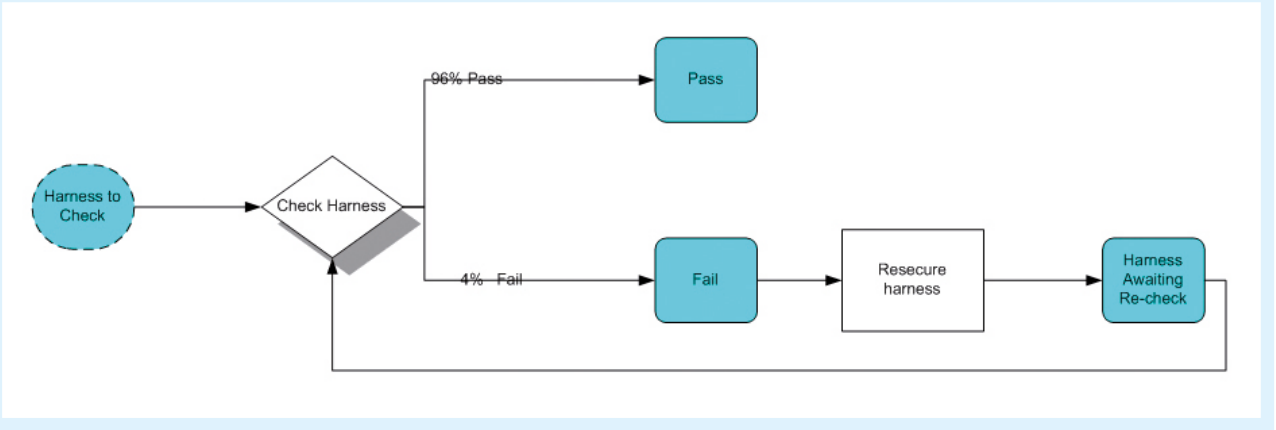
An article about the first 'Maximising the use of' workshop which was held on 19th June is on page 15.

Within minutes of the Manager identifying the problem, the whole ganisation know about it, and field-based workers can see the problem, the level of risk and the supervisor comment on their local computers or mobile devices.

All within minutes – and not a single Visio document has been touched!

Within a few days a workshop is held to understand the cost impact of building in a double-check. The process map is altered to add in the step, and a unit cost attached to the checking stage. It is estimated that 4% of the checks will produce a fail, so Process Simulation will be required to work out the true cost of the new process.

There are 8,000 occurrences per annum of safety harnesses being required, and the process simulation automatically shows an aggregated cost increase of £7.92 per occurrence on average.



The business case is made: 8,000 x £7.92 = £63,360 to reduce the risk of a potential fatality.

As these capabilities come into product during 2013, the Data Manager will form the backbone of how properties are managed and controlled, and how their ownership can be devolved from the process mapping itself.

Simulation and Automated Data Aggregation are currently being developed for release as Feature Previews in version 13.4.

Process Simulation is a very exciting step forward for the Triaster solution. Although in many cases it is possible to mathematically deduce the cost of an end-to-end process, and therefore not necessary to simulate it, as soon as back loops are introduced the mathematics usually quickly become intractable.

Simulation is the "running" of a process thousands of times over so that a count can be made of how often individual process Activities are encountered. With this information, and the unit cost of an Activity, any process, no matter how complex, can be costed (and indeed quantified using any numerical value).

Data Aggregation is the auto-population of numeric fields such as cost based on the quantities of their drill-down maps. Using aggregation, it is only ever necessary to maintain costs of Activities on the seabed (the lowest level of process) – everything else is worked out automatically.

Business Analysts can automatically synchronise the new process costs using a Data Manager, and drive reports and analyses from the spreadsheets where they do most of their work.

Triaster Server - new features coming soon

We are continuing to respond to feedback, as more customers are using the Alerts and Approvals functionality. The current Approvals system has a couple of limitations if multiple approval types are being used:

- The 'Subject to approval' tagline is removed when the Content Approval status is set to Approved. Clearly, this is not helpful if the Compliance Approval status (for example) is still set to Modified.
- The incrementing of the version number (if configured) will happen each time an Approver approves a map; if there is a Content Approver type and a Compliance Approver type, the revision number will change twice during the Approvals process.

We've improved the system so that from version 13.3 it works in the following ways:

- The version (or revision) number will only increment once ALL approvers have approved the map
- The 'Subject to approval' tagline will disappear only when ALL approvers have approved the map. If an author subsequently sets an Approval status back to Modified, the tagline will re-appear.
- An "OverallApprovalDate" property and "OverallApprovalStatus" property will be automatically created. These can be used to create reports about Approved or Unapproved maps within a site. If there is sufficient demand, Triaster will create new reports for download from the Report Exchange.

  Anyone wanting to change their process map template from showing, for example, a 'Last Revised' date to an 'Approval Date' will be able to do so, although this is a chargeable change, costing one consultancy day.

Enhancements are planned for release in 13.4 so that approvers who have maps awaiting approval will no longer be sent a new e-mail every time the Pre-Live site is published. In addition, map review reminders will be able to be sent a set period of time before the review date is due, for example one week before the 'Next Review' date.

The Triaster Suite version 13.3 is due for release in late July. Version 13.4 will be released in September. Both will contain some issue fixes and the new functionality discussed above.

To learn more about these new features and see them in action, please register for a Triaster Release Update Webinar.

Update on the first on-line Feature Prioritisation meeting

The feature request process relies on customers constantly feeding in their ideas and requests for future developments. We also try to involve as many customers as possible in the decision about their development priority. These discussions are just the start of the process; we aim to involve customers throughout - from concept to final development - so that Triaster customers all have the opportunity to impact the shape of the future solution.

> Just a quick note to say thank you for organising today's meeting - I found it interesting to hear how other companies are using Triaster, and of the enhancements that they believe would add value to their libraries.
>
> I am pleased to see that the future roadmap for Triaster is being driven by customer feedback, and would be keen to participate in any future sessions to shape solution designs.
>
> *Mark Johnson*
> *Business Improvement & Change Manager*
> *Mortgages*
> *Barclays Direct*

Until recently the feature prioritisation discussions have taken place during User Group meetings. However they often took longer than the time slot available, so it was decided to hold them via an on-line conference call. As this approach enables all customers, globally, to join in the discussion and share ideas with each other, Triaster plans to continue with this approach as long as customers are happy to participate.

Following some initial voting by e-mail on the ten feature requests of most interest for both Process Navigator and the Process Library, on 11th June Victoria Glancy and Jo Dolton hosted an on-line meeting to discuss the features selected.

They were delighted that customers joined them from various locations including Edinburgh and Seattle. A number of other customers had contributed to the voting beforehand on the feature request selection, but were unavailable to join the discussion. Those who did felt it was very worthwhile:

After further internal discussion with Development, Triaster's Product Roadmap will be updated to reflect the priorities agreed; this will be presented at the Customer Focus Day (11th July, at Triaster's offices) and then posted to the User Group Secure page. In advance of this however, some potential quick wins for smaller features were all given support, such as:

- Spell checking within the Properties fields
- Next review date being automatically populated to 6,12,18 months (configurable) from last review
- Password protection for larger changes to maps, such as Shape Replace
- Finding a tool to check Hyperlink integrity

There was also some great feedback and support on other features, as well as acknowledgement that further discussion is needed for some of the larger scope features, such as:

- Breadcrumb trail to assist users of the libraries to understand where they are
- Designated hotspots/anchors on shapes to affix hyperlinks to

Maximising the use of your latest Upgrade

Triaster held the first 'maximising the use of your latest upgrade' workshop on Wednesday 19th June. The aim of the workshop is to ensure that customers have a good understanding of the new features available from the Triaster Server version 11.2 onwards. The workshop covers what is now available, how to use these features best to achieve maximum benefit and hands-on assistance with changing the configuration of customers own systems.

The workshop was very practical and interactive. Victoria Glancy who was running the workshop covered the following:

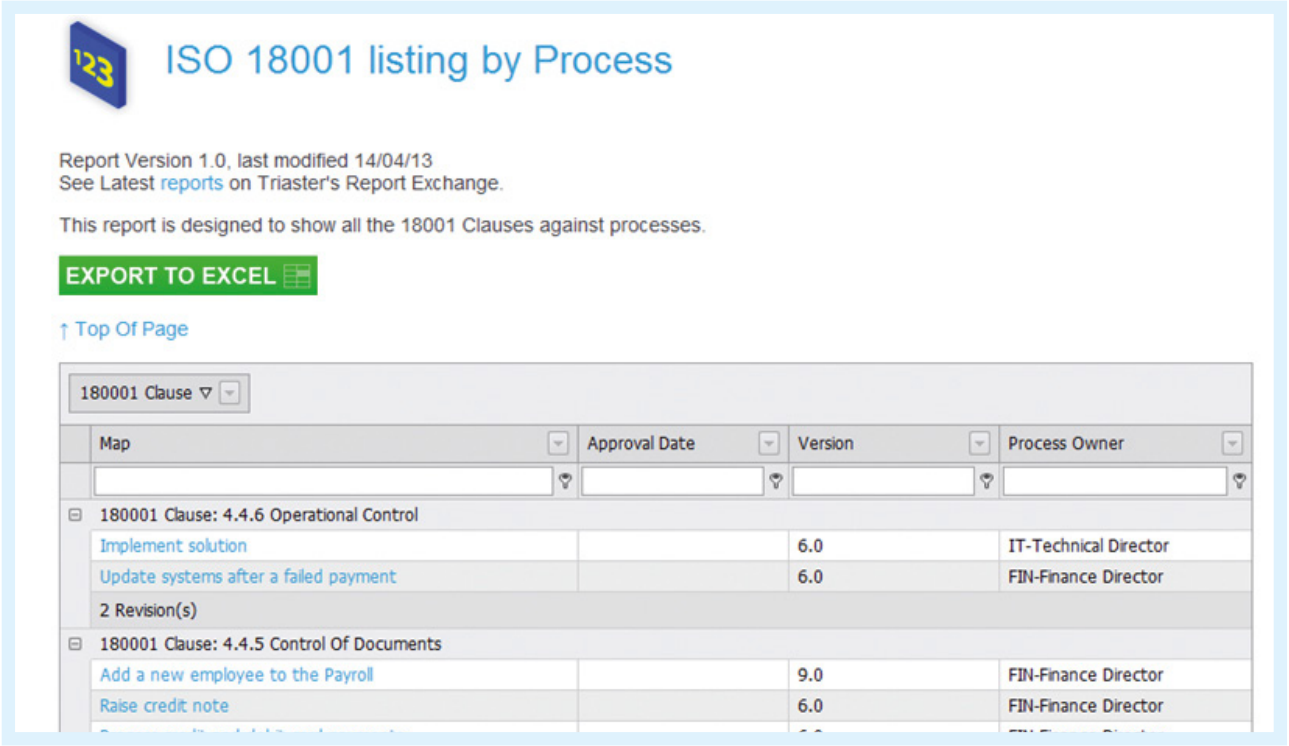
- **Benefits of the new search facility across single and multiple libraries**
- **Introduction to MTop Search Engine Composer**
- **Introduction to WebLog Expert analytics tool**
- **Node Properties Reviews and Revision. Clarification of 'Rework' and 'Modification'**
- **Alerts and Approvals, upgrade of Properties.xml and Settings.xml files**
- **Review of new features in PubServerconfig Utility**
- **Customer questions were answered in detail and customers left with updated Properties and Settings files to meet their Libraries' specific requirements**

Triaster Reports

Paul Elson-Vining looks at new reports for ISO 9001, ISO 14001 and OHSAS 18001

Paul Elson-Vining // Professional Services Consultant

Customers have often asked me about how processes and activities can be related back to the ISO standards. Whilst in the past Triaster have created some custom reports for customers on an ad-hoc basis, recently we have released a standard set of reports that any customer can use from version 11.2 onwards.



ISO 18001 listing by Process

Report Version 1.0, last modified 14/04/13
See Latest reports on Triaster's Report Exchange.

This report is designed to show all the 18001 Clauses against processes.

EXPORT TO EXCEL

↑ Top Of Page

180001 Clause

Map	Approval Date	Version	Process Owner
180001 Clause: 4.4.6 Operational Control			
Implement solution		6.0	IT-Technical Director
Update systems after a failed payment		6.0	FIN-Finance Director
2 Revision(s)			
180001 Clause: 4.4.5 Control Of Documents			
Add a new employee to the Payroll		9.0	FIN-Finance Director
Raise credit note		6.0	FIN-Finance Director

To obtain these reports, download them from the Report Exchange area of the Knowledge Base (www.tinyurl.com/Report-exchange-kb) and drop them into your Reports folder on your server. You will also find a custom Properties file that will need to be incorporated into your own. You can apply the properties list to the Activity or Node sections of the file without having to change the names.

```
<group groupName="ManagementStandards" groupCaption="Management Standards">
    <row rowName="ISO9001Clause" rowCaption="ISO 9001 Main Clause" rowType="3" rowVisioDataType="0">
        <rowValue>N/A</rowValue>
        <rowValue>4.1 General Requirements</rowValue>
        <rowValue>4.2 Documentation Requirements</rowValue>
        <rowValue>4.2.1 General</rowValue>
        <rowValue>4.2.2 Quality Manual</rowValue>
        <rowValue>4.2.3 Control of Documents</rowValue>
        <rowValue>4.2.4 Control of Records</rowValue>
        <rowValue>5.1 Management Commitment</rowValue>
        <rowValue>5.2 Customer Focus</rowValue>
        <rowValue>5.4.1 Quality Objectives</rowValue>
        <rowValue>5.4.2 Quality Management System Planning</rowValue>
        <rowValue>5.5.1 Responsibility and Authority</rowValue>
        <rowValue>5.5.2 Management Representative</rowValue>
        <rowValue>5.5.3 Internal Communication</rowValue>
        <rowValue>5.6.1 General</rowValue>
        <rowValue>5.6.2 Review Input</rowValue>
        <rowValue>5.6.3 Review Output</rowValue>
```

These reports utilise the new grid view functionality which enables processes or activities to be organised by clause number and then filtered by any of the category headings. All of the reports have the same look and feel. The list by process is shown below:

Drag a column header here to group by that column

Map	Approval Date	Version	Process Owner	ISO 9001 Clause
		6.0		
Log call and provide level one analysis	23/07/2012	7.0	SF-Director	4.2.4 Control of Records
Provide application support	23/07/2012	7.0	IT-Director	4.2.4 Control of Records
Add a new employee to the Payroll	23/07/2012	9.0	FIN-Finance Director	4.2.4 Control of Records
Make formal job offer	23/07/2012	9.0	HR-Manager	6.1 Provision of Resources
Select a candidate	23/07/2012	9.0	HR-Manager	6.1 Provision of Resources
Initiate recruitment	23/07/2012	9.0	HR-Manager	6.1 Provision of Resources
Receive and assess applications	23/07/2012	9.0	HR-Manager	6.1 Provision of Resources
Draft the shortlist	23/07/2012	9.0	HR-Manager	6.1 Provision of Resources
Attend Creating maps and populating your Library workshop	18/07/2012	12.0	Solution Fulfilment Director	6.2.2 Competence, Awareness and Training
Attend Governance Workshop	13/07/2012	10.0	Solution Fulfilment Director	6.2.2 Competence, Awareness and Training
Deploy the Triaster Solution	18/07/2012	12.0	Solution Fulfilment Director	7.1.1 Project Management
Install and brand Library	18/07/2012	12.0	SF-Solution Fulfilment Director	7.1.3 Configuration Management

The activity based report shows similar information, but includes the level in the hierarchy instead of the approval date. As with all reports in the new grid format, they can be exported to Excel for further data interrogation. Once the Data Manager is released in version 13.3, this will be even easier to manage.

These reports can now be used as a template for others, such as TickIT, ISO 27001 (Information Security) or BS25999 (Business Continuity).

LIVE FROM LINKEDIN

Recording ISO clauses against processes and activities.

If you had a method of recording the ISO clause number against each process or activity within a process (and be able to report against it), what benefits would you see for auditing purposes?" To see the responses and join the discussion, please click here:

www.tinyurl.com/Linkedin-iso

If you have an idea for a report that will make your Process Library more useful, usable and used, please e-mail your idea and the properties it would need, to featurerequests@triaster.co.uk for consideration.

How can we help you?

A reminder of Triaster's services

Carma Cooper // Client Services Manager & Victoria Glancy // Customer Project Support Consultant

People are often surprised about the range of services that Triaster deliver; so we have set out below a reminder of the packages that we offer and the benefits that they will deliver.

This information can also be found by going to www.triaster.co.uk/how_can_we_help.php. For any further information, please do contact us by calling +44 (0) 870 402 1234 or e-mailing: customer.services@triaster.co.uk.

If there is anything else that you need/would like and which isn't listed below, please contact us and we will do our best to deliver it.

Package	Summary	What's the benefit?	What's delivered (in summary)	Cost indication
Getting the most out of your Library upgrade	**On-site consultancy support during the upgrade process.**	You will know how to maximise the benefit of the latest features from the word go, as well as how to use the upgrade to enthuse your Library users.	Two days on-site to review your new Library with you, train you on how to make the most of the new features, workshop Alerts and Approvals with your reviewers and embed the new way of content review and approval in your organisation.	2 days
Populating your Process Library	**Your processes mapped and published to your Library, together with associated documentation. We also revisit your Governance Framework and ensure that everything is in place to support your project in the long term.**	This package takes you very quickly to the next stage. It will benefit anyone wanting to add more content to their Library at any time.	A planning day to agree objectives and time scales. Also to review and update the Governance Framework. Part of this day can be used for process discovery/mapping if appropriate. The remaining days can be used in the following ways: • Process discovery and mapping • Process discovery facilitation • Process mapping training (the appropriate combination will be agreed with you individually) to deliver content in your Library.	1 Benefit Credit for each 4 days on-site. Package price offered
Scaling your Process Library	**Your Process Library scaled to cover additional business units or departments.**	This is a very cost effective way of getting more benefit from your Library.	A planning day to agree objectives, timescales and approach. The main question to consider is if the new business units or departments will adopt the existing Library or set up their own. We review the technical, design and content production options with you to agree the best approach for you. Following the planning workshop a formal project plan with any associated costs will be sent.	A minimum of 1 day
Stencil and Template Data Visualisations	**An easy to use Stencil & Template with data driven shapes.**	Visualise process metrics.	Stencil & Template with data driven shapes.	A minimum of 2 days depending on requirements

Package	Summary	What's the benefit?	What's delivered (in summary)	Cost indication
Library Communication Programme	**A full communication programme to engage your end users.**	The main benefits of your Process Library are realised when it is used. Keeping your Library users informed, will ensure that they use it.	4 or 8 days, on-site as appropriate, to develop and deliver a full communication programme: • Bespoke plan proposed and documented • Bespoke presentations & demonstrations developed • Communications drafted • Posters • Communication events • Newsletter template developed • Newsletters drafted Very flexible package which will be tailored to your needs.	1-2 Benefit Credits depending on requirements
Disconnected Servers	**A package to enable the deployment of the system to multiple machines.**	A cost-effective way to deploy disconnected servers (read only libraries). It will also be possible to copy documents over with the updates if required.	Project to agree the implementation approach, and install.	1 Benefit Credit. Additional Remote User Support charged on a time and materials basis
Triaster Hosted Hardware	**Gives you a fully managed hosted Library.**	The Triaster Hosted Hardware Solution provides you with a physical server dedicated to your specific project comprising all the hardware and software you need to run the Triaster Solution.	A fully managed hosted Library; • Less involvement by your internal or outsourced IT team • Support calls regarding server side issues can be dealt with directly by Triaster Support • Server upgrades implemented by Triaster • No server maintenance • High specification server	2 Benefit Credits per annum
Process Discovery Workshop	**We work with your subject matter experts to map their processes and publish them to your Process Library.**	Delivers an understanding of process and process mapping techniques, as well as some content for your Library.	A facilitated mapping day focused on your processes resulting in a fully mapped process accessible through your Process Library.	1 day
Library Administration Workshop	**Advance Triaster Software skills.**	Enables you to maintain your Library to a high standard and gives you the skills to fix and resolve issues.	This workshop ensures Library Administrators have all the skills they need to update and maintain their Library. We cover everything from reporting, to properties, to how to update your menu pages.	1 day
Process Discovery Facilitation Workshop	**Learn some techniques for capturing processes.**	Transfers process discovery skills and techniques to your own employees.	Training that covers the skills and approaches that will enable you to successfully facilitate your own process discovery workshops.	1 day
Creating Maps for your Library	**Process Navigator Training.**	Enables you to quickly create and update maps with a consistent look and feel in line with your Mapping Policy.	This training course covers the basic software skills needed to create process maps with Process Navigator and publish them to your Library.	2 days

Package	Summary	What's the benefit?	What's delivered (in summary)	Cost indication
Library Health Checks and Desk Side Assistance	**Very specific help and support for you and your Process Library.**	Have you got an Audit coming up? Is there functionality that you are not making the most of? Do you need help with Library cloning or Properties? Targeted consultancy to deliver just what you need right now.	Whatever you need whilst we are on-site.	A minimum of 1 day depending on requirements.
Managing Library Content	**Establishes a rock-solid Governance Framework to keep your Library content current and your Users updated.**	Your Library content is always current and useful and your Users are always fully informed.	1 day on-site to establish a Library maintenance process to ensure your Library content is never out of date.	1 day
Dynamic Homepage Design	**New dynamic homepage design installed: Click or Hover.**	An engaging, easy to use Library homepage that meets your user requirements.	New dynamic homepage design installed: Click or Hover. 1 day on-site consultancy to cover how to link your menu options to your process maps and on-going administration.	2 Benefit Credits
Joint Venture Library	**A customised Library to support your joint venture.**	A cost-effective way to ensure the effectiveness of your joint venture project.	A planning day to agree objectives, timescales and approach. The main question to consider is how closely the joint venture Library will mirror an existing Library. We review the technical, design and content production options with you to agree the best approach for you. Following the planning workshop a formal project plan with any associated costs will be sent.	A minimum of 1 day
Bid Library	**A Process Library specifically to support your new business bids.**	When going through a tender process, bidding for large projects, you have to demonstrate that you have all the processes in place to support your proposal. This package enables you to easily and cost effectively benefit from your existing Library content to do just that, in a way that positively differentiates you from the competition.	A planning day to agree objectives, timescales and approach. The main question to consider is how closely your Bid Library will mirror your existing Library. We review the technical, design and content production options with you, to agree the best approach for you. Following the planning workshop a formal project plan with any associated costs will be sent.	A minimum of 1 day
Train the Trainer	**Gives you the skills to train your own delegates.**	Enables you to run ad-hoc training sessions as per your own requirements.	A skills transfer session, followed by the delegates delivering a mini training session.	A minimum of 1 day depending on requirements
Annual Priority Support	**A dedicated contact, bypassing the normal Support process.**	Ensures that your enquiry is always given the highest priority and saves you time making those little configuration changes.	A dedicated contact that will take all technical queries directly, bypassing the usual Support process. They can also make those odd configuration changes for you when required without further cost.	2 Benefit Credits per annum

Triaster Trusted Partner Agreements

Jo Dolton reminds us of the benefits included as standard

Jo Dolton // Customer Relationship Manager

Following the launch of the Trusted Partner Agreements in 2010, most customers have moved onto these flexible agreements and the feedback has been great. The range of options available has also made it easy for new customers to adopt the Triaster Solution, knowing that they have an agreement option to suit every stage of their project.

The Trusted Partner Agreements do cover a lot though, some of which I find customers forget, so here's a reminder of what they all cover as standard and the benefits this brings.

Software

Flexible mapping licences

The licence flexibility built-in copes with process author changes simply and efficiently. You can transfer a licence from one person to another many times over. Process Navigator licences are completely portable and can be assigned to anyone you choose, for as little as one month at a time.

Benefit:
You can plan for projects over the long term, knowing that your costs will remain stable, even if your project team changes.

Unrestricted libraries, unrestricted users of them

The server based licensing and the ability to create libraries at the touch of a button, makes it easy to create libraries to support additional departments or even short and long term projects – and there is no additional cost. A multiple Process Library architecture is supported, as are separate libraries set up for client facing requirements and joint ventures. You can even have what we call "Disconnected servers" which sit on a standalone machine for remote workers to access when network connections to the main server are not available.

Benefit:
Setting up additional libraries, including a multiple Process Library architecture and bringing on-board additional users does not increase the cost of your Agreement. In fact the more departments on-board, the more you can spread the annual cost of the Solution across your company; gaining a wider return on your investment.

PEV's Shortcut

Did you know 'Control + F' finds shapes or text in a Visio Diagram?

Free Test Server

A free test server is built into all Agreements. The server can be either hardware or a virtual server. For all Hosted customers Triaster will provide a test server for the initial new Library install.

Benefit:
Initial installation of the latest software on a test server enables testing of how the latest Library functionality behaves with your specific process maps and will enable the ironing out of any issues before the Library is installed on your live server. All customers installed to Triaster Server 13.1 or later are able to self-upgrade, so installing to a test server in the first instance becomes even more important.

Project Support and Services

Training

Any member of your organisation can attend one of Triaster's regular two-day public training courses, (held at our HQ in Wallingford) free of charge. This could be for basic training for new users, or as a refresher course to update existing users regarding new features released.

Benefit:
You can plan over the long term, knowing that your training costs will remain stable even if your project team changes.

Project Support

Our Customer Success/project support team work in partnership with you and your team to ensure that you meet your objectives.

Benefit:
You can deliver successfully, without the worry of incidental costs for project advice and assistance.

Additional Requirements

Flexible Benefits

Flexibility is built-in to enable you to choose a variety of additional benefit(s) each year. These can be, for example, hosting, additional mapping licences, on-site consultancy or Library re-design services. Simply pick the Agreement level that suits your organisation and budget and then call off your Benefit Credits as required throughout the year.

Benefit:
You can choose increased licences one year, more consultancy expertise the next…it is entirely up to you. Or if preferred, you can select the Agreement level without Benefit Credits built-in.

What if you need more...?
You can purchase additional Benefit Credits at a very cost effective rate, which can then be converted to services, licences, hosting etc. just as with the Benefit Credits built into your Agreement.

Of course, all agreements also cover the usual Technical Support and upgrades of the software, as well as the ability to join Triaster User Groups and share your thoughts on the shape of the future Triaster Solution.

If you would like to discuss your Triaster Agreement at any time, please either call Jo Dolton on 0870 402 1229 or e-mail customer.services@triaster.co.uk

Creating Maps for your Library

Our public training sessions are now booking up fast; we are even taking bookings for December!

So, if you have new team members to train or would like a refresher, we advise that you book your place ASAP to avoid disappointment.

For more information or to book your place please go to www.triaster.co.uk/events.php

For the full run-down of Triaster Events and to book your place visit: www.triaster.co.uk/events

Overall; the staff involved, the environment, the course materials, equipment, approach and content all contributed to this being one of, no, to this being THE best training experience I have come across. Thank you, see you next time.

Office2Office

PEV's Q & A corner

Q: I have five columns of activities on one A4 page and don't want to create a new page for just one activity; do you have any suggestions as to what to do?

A: For those that know me, you will be aware of my compulsion for maps to be neat and tidy. There are two options available to you in this instance. The first is to 'snake' the process down the page, which can make the map look quite messy. The second (no surprise, my preferred option) is to make all the shapes a bit smaller.

The easiest way to do this is to use the size and position window to reduce the width of the activities down from 25mm to 23mm. You can then take 1mm from the width of the deliverables. An auto layout will almost fit on the page, so at this point I would reduce the gap between each shape manually to get the map to fit.

Tech News

Settings.xml and Approvals Configurations

John Blight // Technical Support Manager

The article below is intended to give an insight into what is going on 'under the hood'. A new interface is under development to allow easier editing of these configuration settings; a prototype will be demoed at the Customer Focus day on 11th July.

In Triaster Server 2011, nearly all configurations have been consolidated in a single file:

Triaster\Triaster2011\Settings\Settings.xml

There are configurations that are scoped to the server, to a library and to sites.

Originally, approval configurations applied to all libraries. However, from Triaster Server 13.1, approvals can be scoped to a library. Of course, such configurations can be made through the Approvals page of a Process Library website. However, it may sometimes be easier to edit Settings.xml directly, particularly when settings are copied from one area to another.

IMPORTANT: Whenever Settings.xml is edited, a back-up copy should be taken first. The integrity of this file is important, as so much depends on it.

Approvals

Approvals can be configured to be scoped globally or to a library. This would be commonly done using the publication configuration utility, but is accessible directly in Settings.xml. In Settings.xml:

```
<Settings>
 .
 <ServerGeneral>
  .
  <GlobalApprovers>false</GlobalApprovers>
```

Approvers (but see below), authors and functions that are defined globally aren't visible through a library site's Approvals page.

Approvers

Approvers are defined globally, and are then conferred permissions at a library level.

Global approvers

In Settings.xml:

```
<Settings>
 .
 <ApprovalCategories>
 </ApprovalCategories>
 <Users>
  <User>
   <Username>Installation Only</Username>
   <EmailAddress>E-mail Address</EmailAddress>
   <Password>Encrypted password</Password>
   <AdminUser>True</AdminUser>
   <ApprovalUser>True</ApprovalUser>
   <SuperUser>True</SuperUser>
  </User>
  <User>
   <Username>User Name</Username>
   <EmailAddress>E-mail Address</EmailAddress>
   <Password>Encrypted password</Password>
  </User>
```

Library approvers

In Settings.xml:

```
<Settings>
 .
 <PublicationSettings>
  .
  <Library Name="Library Name">
   .
   <Site Name="Site Name">
    .
    <UserPermissions>
     <Permissions EmailAddress="E-mail Address">
      <UserAdmin Permissions="True|False">
      <Publish Permissions="True|False">
      <Approve Permissions="True|False">
       <SuperUser Permissions="True|False">
      </Approve>
     </Permissions>
```

When a new approvals user is added through the Approvals webpage, a new global User record is created, and UserPermissions records for the library sites.

Authors

A map's author is defined in the Author property of a Node (Prop.Author). Any such author should have a corresponding record on the server, with an associated e-mail address to which alerts can be sent.

Global authors

In Settings.xml:

```
<Settings>
 .
 </PublicationSettings>
 <Authors>
  <Author>
   <Username>Author Name</Username>
   <EmailAddress>E-mail address</EmailAddress>
  </Author>
```

Library authors

In Settings.xml:

```
<Settings>
 .
 <PublicationSettings>
  .
  <Library name="Library Name">
   .
   <Authors>
    <Author>
     <Username>Author Name</Username>
     <EmailAddress>E-mail address</EmailAddress>
    </Author>
   </Authors>
   <ApprovalCategories>
   </ApprovalCategories>
  </Library>
```

A global author record (everything within and including the <Author></Author> tags) can be copied to a library section in Settings.xml.

Functions

A map can be related to a business function (a Node's Business Function property - Prop.Function). A Function record on the server would typically be associated with a distribution group's e-mail address so that members of that group can be alerted to a change in a published map.

Global functions

In Settings.xml:

```
<Settings>
 .
 .
 <ApprovalCategories>
  <ApprovalCategory>
   <Name>Function Name</Name>
   <EmailList>E-mail address</EmailList>
  </ApprovalCategory>
Library functions:
In Settings.xml:
<Settings>
 .
 <PublicationSettings>
  .
  <Library name="Library Name">
   .
   <ApprovalCategories>
    <ApprovalCategory>
     <Name>Function Name</Name>
     <EmailList>E-mail address</EmailList>
    </ApprovalCategory>
   </ApprovalCategories>
  </Library>
```

Just as for authors, the global records can be copied to a library section. A function record is that within and including the <ApprovalCategory></ApprovalCategory> tags.

So in summary, direct editing of Settings.xml can be quicker and easier than the website or server configuration utility interfaces. If you choose to do this:

- Be aware of the importance of this file, and always take back-up copies that can be restored.
- Note the scope of the configurations to be made.
- Maintain indenting so that the logical structure of these configurations is evident.

Meet Ashwin Jayapaul

Technical Support Administrator

Fact File

Been working with Triaster since
2011

Before that
Completed an NiTP Microsoft apprenticeship

Professionally he is most proud of …
Being involved in a major multiple library architecture implementation

Hobbies
Playing football, reading, going to the gym

Likes
Learning to drive, watching films & Manchester United FC

Dislikes
Snakes and long journeys

Everyone at Triaster will always remember…
Shortly after joining Triaster as an apprentice, Ashwin accidently ate Mike's meal at the Triaster Christmas party – not a great start!

Ashwin who (like James Harvey) joined Triaster as an apprentice, became a full time member of Triaster's technical team at the beginning of April. As with everyone in the Triaster technical team, he has proved himself adept in a varied role, delivering on technical implementations - both new and on upgrade – quality audits and Support. He is also involved with development projects on occasion. We are all impressed with his mature approach at the start of his career and his willingness and ability to learn new skills.

When asked for his reflections on life in the Triaster technical team, this is what he said:

"

One of the things that I have really enjoyed over the last few months is working with the team to deliver implementations for customers. The implementation that I am most proud of being involved in is a multiple library architecture project. This gave me an opportunity to learn new technical skills, work with new Triaster Server and Process Navigator functionality and get involved in the Development cycle. However, the main reason I enjoyed this project was because it was great to work with the rest of the Triaster team and the customer to make the project a success.

As some of you may be aware, I am also part of the support team. At first I found answering support enquiries quite challenging as no enquiry is ever the same, but with the help of John Blight and James Harvey, I've been able to build my knowledge and understanding of the Triaster software which is helping me develop my confidence in approaching/ solving a support enquiry.

Obviously being part of the Support team means that I am often in contact with the Triaster community; this is something I hope to be doing more of in the near future. Currently, I am attending some Triaster events and meetings so that I get an opportunity to meet some of the people I talk to. I will also be holding a short workshop at the Customer Focus Day on 11th July, so I look forward to seeing some of you there!

Community Events

Jo Dolton & Emily Constance review the upcoming calendar

Jo Dolton // Customer Relationship Manager & Emily Constance // Business Operations Manager

Triaster and our customers host a number of events as listed below. Many of these events are free of charge to organisations with a Trusted Partner Licence Agreement. Of course, all Triaster training courses can be delivered on-site, if you would like to discuss this further, please give us a call: +44 (0) 870 402 1234 or e-mail customer.services@triaster.co.uk

Date	What is the Event?	Who benefits from attending?	How will I benefit?	Location
11th Jul 2013	**Triaster Customer Focus Day**	Project Leaders interested in influencing the development of Triaster software & services	Customer Focus Days give the opportunity to workshop with Triaster development regarding both software and services and directly influence and impact the end results. "A golden opportunity to influence the development of the solution to deliver on your company objectives" Skanska	Triaster HQ, Oxfordshire
16th Jul 2013	**Making the most of Process Mapping - Useful, Usable and Used**	Anyone interested in process mapping	These seminars will give you an insight into the creation of user-centric Process Libraries to support business process management and process improvement.	Cardinal Place, Microsoft, London
25th Jul 2013 26th Sep 2013	**Release Update Webinars**	All Triaster customers	An executive briefing from the Triaster Team looking at new features from Triaster, what's happening in the Triaster Community and what's coming up next.	Webinar
19th & 20th Aug 2013 21st & 22nd Oct 2013 9th & 10th Dec 2013	**Triaster 2 Day Training - Creating Maps For Your Library**	Anyone needing to map their processes	This training course covers the basic software skills needed to create process maps with Process Navigator and publish them to your Library. "The whole course was useful. I have been busy with Triaster for some 6 months - and I finally get the concept...before that I was just messing about really..."	Triaster HQ, Oxfordshire
4th Sep 2013	**Customer Experience Exchange**	Existing Triaster customers and potential customers from all sectors	Each Triaster customer has a different experience of working with the Solution. Both existing and potential customers frequently say how beneficial it is to hear and discuss how other customers are working with the Triaster Solution. That is what this event is about - three very different customers share their experiences. " The diversity of use is encouraging. Thoroughly enjoyed this event, thank you." SQA	Triaster HQ, Oxfordshire

Date	What is the Event?	Who benefits from attending?	How will I benefit?	Location
5th Sep 2013 14th Nov 2013	**Maximising the Use of Your Latest Upgrade**	All Triaster Customers on Server 11 or above	Now that you have had a chance to try out your upgraded Library, come along to understand the different configuration options and how they may best support your objectives.	Triaster HQ, Oxfordshire
10th Sep 2013	**Triaster Partner Seminar**	Consultants interested in partnering with Triaster	The seminar will detail the Triaster Solution, how we work with our customers to create great Process Libraries and how you could work in partnership with Triaster to achieve the same success with your customers.	Triaster HQ, Oxfordshire
11th Sep 2013	**Making the most of Process Mapping - Useful, Usable and Used**	Anyone interested in process mapping	These seminars will give you an insight into the creation of user-centric Process Libraries to support business process management and process improvement.	The Palace Hotel, Manchester
9th Oct 2013	**Customer User Group**	All Triaster Customers	A great opportunity to meet customers from a variety of industries and share your views and experiences of Triaster. "Come along to our lively and interactive User Group meetings and gain an opportunity to influence future Triaster developments as well as getting to know some like-minded people." Linda Spinks, University of Cambridge, User Group Chairperson	3663, Manchester Depot, Salford
Dates TBC	**Education Special Interest Group Meeting**	Triaster Customers in the Education sector	Meeting users in the Education sector who are able to share, understand and solve each other's problems with process in this particular environment.	Venue TBC
Dates available on application	**Triaster Training - Technical Workshop**	Library Administrators, IT and Support professionals	The workshop answers in-depth all of the commonly asked technical questions about the Triaster Server installation; as well as providing plenty of opportunity for delegates to discuss their own systems. "I would recommend the workshop as it gives the attendees a good insight into how all the elements of Triaster piece together." Rob Fletcher, ING Direct	Triaster HQ, Oxfordshire
Dates available on application	**Triaster Training - Process Discovery Facilitation**	Anyone responsible for process discovery	Training that covers the skills and approaches that will enable you to successfully facilitate your Process Discovery workshops. (Triaster can also deliver on-site Process Discovery workshops.)	Triaster HQ, Oxfordshire

Not to be missed!

The next Customer Experience Exchange will be held on 4th September 2013. Make sure that you attend !

For more information and registration for this and other Community Events please go to:

www.triaster.co.uk/events.php

Great to learn and hear of other customer experiences first hand.
3663

Fantastic open environment to share real experience.
NothgateArinso

From the Community

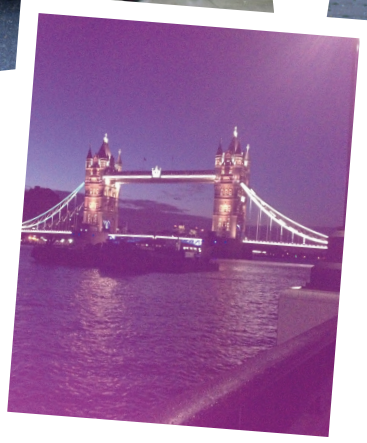
Latest news and discussion

Personal challenges/sponsored events

You may have seen in the May/June Connector that Mike completed his first Triathlon earlier this year. He has now taken the brave step of an Olympic length Triathlon, which is 1500m swim, 40km bike, followed by 10km run.

And if that wasn't a big enough challenge, the swim takes place in the Royal Victoria Dock. We all wish Mike the very best of luck!

Are you taking part in any events this year? Why not let us know by e-mailing customer.services@triaster.co.uk We love hearing from you!



An update from Linda Spinks regarding her Moonwalk experience; she completed the 26.2 miles in just under 6.5 hours and as a group they raised almost £7,000!

Well done Linda!

Competition – Guess who!

It's time for a new competition and we thought this time we would do something a little bit daft!

If you studied the May/June Connector, you will know that Victoria Glancy, Project Support Consultant, recently had a big birthday. As part of her birthday celebrations she hosted a fantastic 80's party on-board a boat on the River Thames.

Reply by 9th August for your chance to win a £15 Amazon Voucher!

Can you guess which member of the Triaster Team is in this photo and the character they are dressed as?

Please submit answers to puzzle@triaster.co.uk by Friday 9th August 2013 for a chance to win a £15 Amazon voucher. Both answers must be correct. A winner will be picked at random and announced in the next edition of the Connector.

Great to see!

We are delighted to see another fantastic article from a member of the Triaster community.

In the May edition of UK Excellence, Dennis Keegan and Julie Mack from 3663 discuss implementing an on-line process management solution and the challenges they faced along the way.

PROCESS MANAGEMENT 3663

3663 in numbers: 45,000 deliveries per week; 4,200 employees; 800 temperature-controlled vehicles; 23 depots

Dennis Keegan is Head of Business Improvement at foodservice wholesale distributor **3663**. He shares his insights into the challenges of implementing an online process management solution and how to bring about organisational change without biting off more than you can chew

STARTING WITH THE PROCESS

ONE-TO-ONE COACHING

PAPERLESS SUSTAINABILITY

UKE TIPSHEET

One of 3663's 800 temperature-controlled vehicles making a foodservice delivery

You can download a copy of this article at the Connector website: www.triaster.co.uk/connector

Careers at Triaster

Triaster are looking to expand the team. We are looking for the following excellent candidates:

- **Experienced Software Engineer – full time role**
- **Business Analysts and Process Mappers – to join the growing team of experienced Triaster users that we call on when delivering full Process Library content.**

For more detail on these roles please go to: www.triaster.co.uk/career_opportunities.php

Triaster is a close knit, high performing team who always put our customers first. If you have the experience and the aptitude that we are looking for, we would be delighted to hear from you.

Return on Investment (RoI) From Quality Management

Michael Cousins' considerations, part two.

Michael Cousins // Managing Director

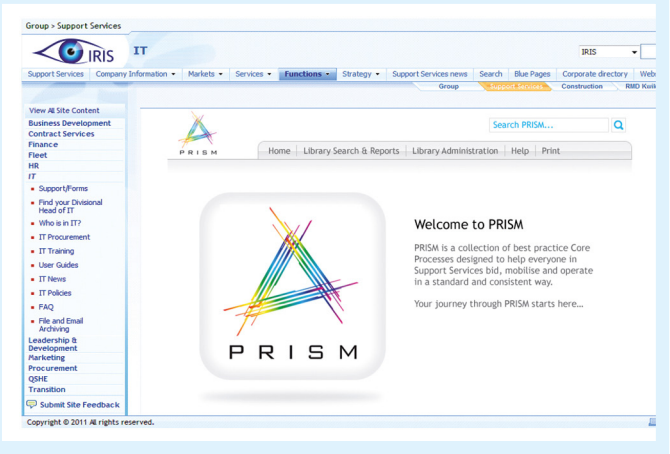
In part one of this article in the last Connector I pointed to research (available from The CQI www.tinyurl.com/the-CQI) that provides clear evidence that investment in quality management delivers financial RoI.

How can a Process Library help increase revenues and/or reduce costs?

So in respect of a Triaster implementation, how is the RoI actually generated? How can a Process Library help increase revenues and/or reduce costs?

The answer is: in some direct ways and some indirect ways.

Looking at the direct ways first, RoI can only be generated by increasing sales, or reducing costs. Following are some of the ways that Triaster customers have done both.

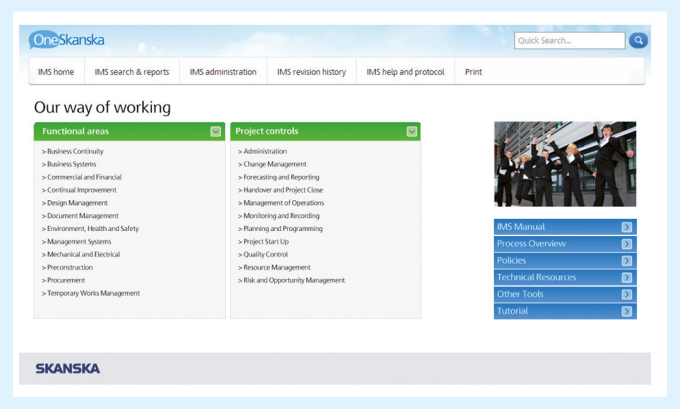


Sales can be increased by visibly demonstrating to your prospects that you have the processes in place to support your delivery claims. Interserve FM, who deliver support services to key customers such as the Ministry of Defence, started by sharing their Defence Library with the MOD. This enabled the MOD to access the specific processes and procedures by which their contract was being delivered. Interserve are clear that the Defence Library was one of the reasons that they won a new Four Islands contract with the MOD in 2012. This led them to support more new business bids with their Process Library, PRISM, winning for example an NHS contract in Leicester shortly after. (November/ December 2012 Connector)

Other customers have set up specific 'bid libraries' to support large tenders. Bids for multi-million pound projects can take years to put together and a small forest in paperwork to support. As eloquently spoken about by CarillionMouchel at the Triaster Conference in 2010.

And of course paperwork can't be searched, is hard to work with once you have won the bid and has all the other downsides of paper-based quality manuals, which we all understand so well. So how much more effective to win new business with a Process Library which is ready to go as your Business Management System, when you start to deliver. Which is exactly what Balfour Beatty found when they were awarded a £414 million contract by Bord Gais Networks in the Republic of Ireland, in a joint venture with CLG Developments Ltd.

Where the bid is a joint venture (as with some of the examples above), supporting your bid with a Process Library is a particularly effective way of showing that you have established your processes and really have worked out how you are going to collaborate to deliver on the project.



When it comes to direct cost reductions, these are most obviously seen by our customers in a reduction in audit costs. In 2012 Skanska UK saved £40K in audit fees, just in completing their stage one ISO assessment. (January/February 2013 Connector). Balfour Beatty Civil Engineering found that their Process Library reduced the number of days that their ISO auditors were on-site from 80 to 40 days, with the corresponding reduction in fees.

Then we come onto how a Process Library drives efficiency. Every time a process is improved to cut out a wasteful step, costs are saved. Every time someone can quickly and efficiently find out how to do something, costs are saved. By just looking at the ING Direct case study on our website, we can see how by removing several duplicate steps in the BACS file process, 200 minutes a day were saved within their IT Ops and Payments team. Also that their Customer Service Associates no longer needed to ask for help, instead using their Library to find out what they needed in terms of process steps, mandatory call scripting, letters and forms.

Until this year it has been hard to quantify and demonstrate those cost savings. However Triaster is coming into its own on this in 2013. With the new simulation and synchronisation capabilities being released this year, it will be so much easier to model new processes and produce quantified analyses providing impact on costs.

Which doesn't leave much room to talk about indirect generation of RoI. This should not be overlooked however. Improving quality, improving customer service, achieving certifications, all of which can be delivered by a Process Library, do not deliver an immediate RoI. However, by differentiating your organisation from your competitors by delivering service excellence you will create intensely loyal customers (raving fans as Openfield call them, January/February 2013 Connector) who will return your investment in your Process Library many times over.

If you have captured measurements of either direct or indirect RoI please go to www.triaster.co.uk/connector and click on 'Connect' to tell us about them.

© Triaster Limited 2013