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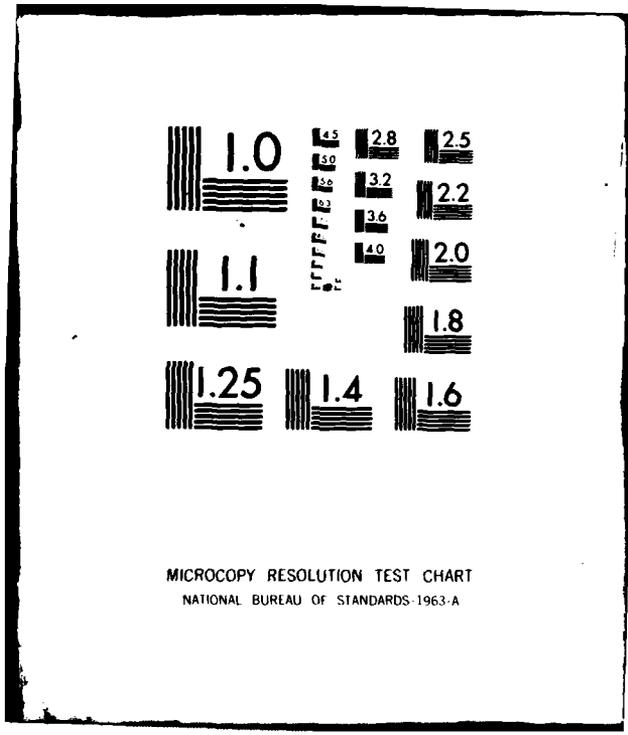
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THE PEOPLE/PROMISE TRACKER:
Preliminary Description

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David J. Root

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The People/Promise Tracker: Preliminary Description

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As we and Zisman have observed in earlier work[1,2], true automation in the office is rather different than mechanization. Automation comes when the initiation of activities is aided by the system rather than the system merely serving as a passive tool to assist when the person asks. In this vein, we have built upon the SCOOP (System for Computerization of Office Processes)[3] and SEED [4] database systems an office automation system which keeps track of the promises we make to people, and those they make to us.

The basic menu for entering data about a person contains not only the normal name and address fields, but also the electronic mail salutation and address. The system works best with people who can be reached via some automatic electronic mail facility. This is used to create a database entry for a person. Clearly, one may make promises to organizations, or to roles (e.g., to the vice-president for marketing- telling him the program will be ready for delivery on Monday), but initially we have worked on it for promises to other humans only.

The system is designed to be used in real time when promises are normally made. In the case of the authors, this usually means during a telephone conversation with someone. Hence, the interaction must be efficient. After instructing the system to run TRACK, the initial message asks for a name. If nothing is typed in, the system shows the main menu, which includes options for examining and updating the status of tasks to be done, contacts which have been made with people, and updating of persons. However, a typical interaction (shown in prompted form for clarity, although the system uses menus on a video display terminal) follows. Underlined items are entered by the user. This is meant to give the reader the general notion of how the system is used.

PERSON: morgan
Howard L. Morgan, Professor, The Wharton School OK? Y
Enter, update, task or contact? ET
Enter task short description: Prepare SIGOA paper
Promised to: Abbott
Russell Abbott, Chair, SIGOA OK? Y
Promised for: SIGOA News
SIGOA Newsletter, Mike Barnett OK? Y
Promised to: Kernighan
Brian Kernighan, Bell Labs OK? Y
Promised by: morgan
Howard L. Morgan, Professor, The Wharton School OK? Y

Enter task long description:
Prepare a short document for the SIGOA newsletter which must be sent to Brian by Jan 11th.

Entering task 22, confirm? Y
Date due: 11.1.80
Date promised: 5.1.80

The above sequence enters a new task on the system. Two days prior to the due date for the promised task, an electronic message goes to the person who has promised the task. If the task is not performed and the system so informed, additional messages are sent to the promisor.

In addition to keeping track of tasks, the database can be viewed by person, and can also have records of contacts. The following is the display for the pseudo-person SIGOA.

Name: SIGOA
Address: ACM Special Interest Group on Office Automation
 c/o R. Abbott
 Cal State University
 Northridge, CA
Phone:
Electronic mail address: Kernighan@CMU-10A
Promised to:
1. Paper for SIGOA newsletter (11.1.80)
2. Serve as Vice-Chair (15.11.79)
Promised for:
Promised by:
17. Receive newsletter at OAC (5.3.80)
Contacts
19. Telecon with Abbott on formation of SIGOA

The tracker allows the user to know, when he answers the phone, what the likely questions from the party on the phone will be. The quick listing of what is owed to, by, and for that person, along with recent contact information, permit more informed conversation. In addition, knowledge of who various tasks are delegated to can also be maintained by the system.

We have implemented the system in PASCAL on the Wharton DECSys-10. It has been in test use since September 1979, and is currently being improved in the user interface area. We feel that the ability to integrate the tracking, database, and electronic communications aspects of office automation provides another step forward towards the true types of automated office tools. We welcome comments on the system.

References

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2. Zisman, M. "Office Automation: Revolution or Evolution" Sloan Management Review, Spring 1978.
3. Zisman, M. "SCOOP: System for Computerization of Office Processes" Working paper, Dept. of Decision Sciences, The Wharton School, Philadelphia, PA.
4. SEED Reference Manual, International Database Systems, Philadelphia, PA.

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