



# JobTraQ<sup>®</sup> Task Management

JobTraQ<sup>®</sup> automates human to human workflow and simplifies hierarchical team management of collaborative tasks. JobTraQ<sup>®</sup> automates what data needs to be collected and displayed through each step of a task's workflow and pushes the task to the next step in the process. JobTraQ<sup>®</sup> can be rapidly adapted to model your business process frame work using task templates, custom fields, statuses and workflow rules. Also with powerful role based permissions, JobTraQ<sup>®</sup> controls task and field level visibility amongst team members, departments and managers. JobTraQ<sup>®</sup> allows organizations to gain control and visibility into their tasks.



*JobTraQ Core Features*

JobTraQ<sup>®</sup> simplifies team management with collaborative task lists, email notifications and visibility into tasks and projects. Accountability is ensured with comprehensive Sox-ready audit trails. Checkpoints provide email notifications to prevent tasks from falling behind milestones. Metrics provide insight into team and individual time based performance.

Systems integration include Microsoft Outlook<sup>®</sup>, LDAP authentication and an open web services programming interface. The JobTraQ<sup>®</sup> Outlook plug-in synchronizes JobTraQ<sup>®</sup> tasks, appointments and contacts with local ones. End users resistant to new tools need not open JobTraQ web interface; tasks and appointments will appear as assigned in their Outlook task lists. The JobTraQ<sup>®</sup> LDAP integration



allows use of Windows username and password to login to JobTraQ®. The web services interface allows customization and integration with other information systems.

System configuration allows users to automate their own task management without the need for a programmer or database administrator. Users with system administrator privileges can create their own fields, task templates and statuses to model their workflow. JobTraQ® replaces paper processes with drag and drop task forms. Visibility into task fields and task queues is controlled by role based permission groups.

**Intuitive Real-Time Notifications**

**Subject:** Status changed to Work In Progress for Task #43887. If there are many groups, the charts should combine the small groups in...

[Click here to access](#)

Changed fields are highlighted in orange.

**Status:** Work In Progress

ID	User	TimerCategory	Comments	Start/End	Total Time
1	Amir Maharjan	Internal Software Dev		4/8/2008 5:05:53 AM In Progress...	N/A

File Name	Brief Description	Upload Date
Chart.JPG		3/29/2008 9:37:35 PM

www.SwiftSoftware.com | www.JobTraQ.com

Sample Email Notification

JobTraQ® provides instant email notification upon the creation or assignment of, or changes made to, a task or project. Administrators can easily define the rules by which users receive notification. In addition, when a task or project is overdue, JobTraQ® also sends email reminders to the assigned task owner, (managers, and/or the project manager or other assigned recipients), keeping projects visible and on track.

For team and individual tasks, JobTraQ® provides email reminders of daily task summaries. For managers, team task summaries are provided with a listing of task alert levels, notification upon the creation or assignment of, or changes made to, a task or project. Administrators can easily define the rules by which users receive notification. In addition, when a task or project is overdue, JobTraQ® also



sends email reminders to the assigned task owner, (managers, and/or the project manager or other assigned recipients), keeping projects visible and on track.

The JobTraQ® Web Based Task List

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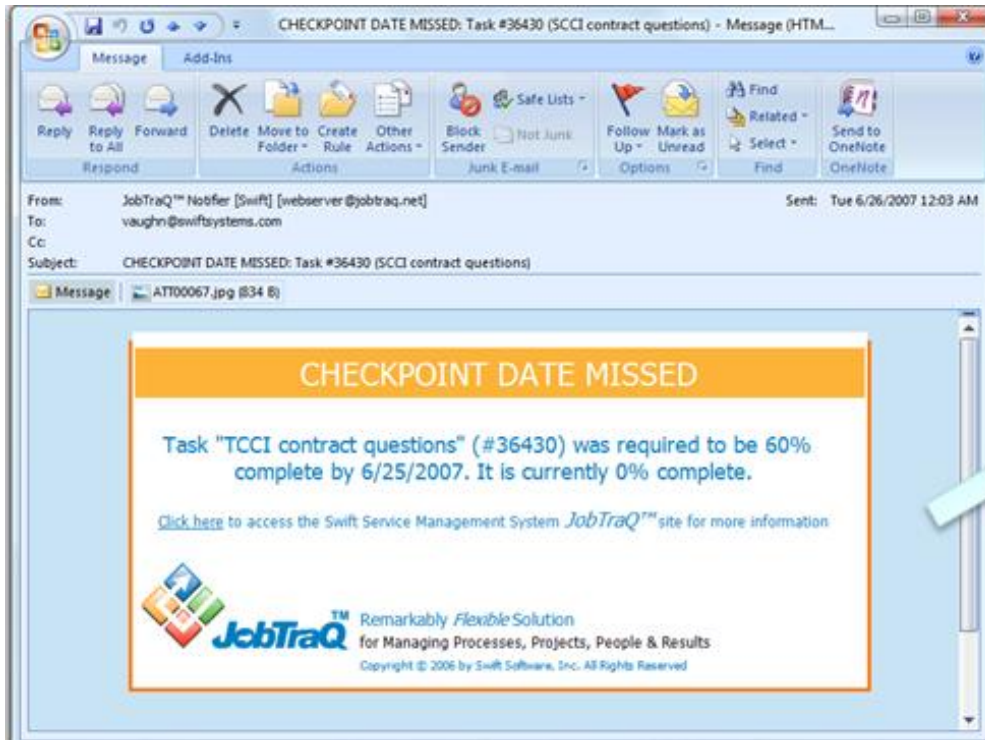
### JobTraQ® Web Based Task List

The JobTraQ® web interface above allows searching and sorting of tasks. Create multi-criteria searches and custom field display and then bookmark them as a saved view. These saved views can be shared among a permission group so that as administrator can customize user group saved views. Also, any unsaved work will be automatically retained in the dashboard for later retrieval.

For Project Management, JobTraQ® provides a web-based project plan allowing users to check status; start and finish dates, notes, resources and data associated with each task. View color coded Gantt charts, update plan, start and finish dates, notes, resources and data. JobTraQ® provides import/export to and from other programs. View project plan by filters including date; client; project or task type; billing and invoice specifications and more, including any custom fields.

For accountability, JobTraQ® keeps a complete audit trail of all changes to tasks, projects, project assets and contacts. This allows you to find out who changed a record or any field or other asset and when they did it via a non-repudiated and easy to view action log. This feature provides a vital tool for Sarbanes-Oxley , ITIL, and HIPPA compliance, as well as being useful in day-to-day business use.





*Checkpoint Proactive Alerting Sample Email*

With Checkpoints proactive alerting, JobTraQ® allows managers and staff to easily create checkpoints allowing a forward looking view to assure that projects and tasks are on time. With checkpoints, predefine that if a project or task is not X% complete by a certain date that reminders should begin to prompt or alert the assignee or others that the item is falling behind. One of the benefits of this approach is that management alerts can be built in if critical dates are within the predefined "risk distance". In other words, setup a checkpoint so that if a project or task in the task management system is not at least 70% complete by a certain date, escalate the task to a departmental manager for corrective action. This is particularly useful in financial services where late reporting can lead to serious fines.

For reporting, JobTraQ's new Business Intelligence report module allows end users to create reports on the fly from any custom fields created within JobTraQ. These reports can be shared, emailed or scheduled. The Business Intelligence report module is optional and purchased separately. There are complete HTML and CSV built in reports on tasks, contacts, and scheduled tasks. These reports allow you to easily view, print, or export information into other programs such as Microsoft Excel or Crystal Reports. In addition, JobTraQ® includes a custom-report interface which allows developers to construct advanced integrated reports based upon your specific business needs.

JobTraQ® provides a powerful real-time integration with Microsoft Outlook®. JobTraQ® does not overwrite the built-in calendar, contact or task lists, but rather adds a new distinct and enhanced copy of each that is synchronized real-time with the JobTraQ® web server via our powerful and open XML integration engine. This allows end users to pick up their daily tasks from an Outlook task list, or view them via an Outlook Calendar, but once they select and open a task they are given all of the power of JobTraQ® right from within the familiar Microsoft Outlook® interface. They can see the custom fields



that were predefined in JobTraQ® for the type of task they are working on. Their changes are saved to the audit trail. Notifications are sent when they update status or reach a milestone, and the workflow engine still analyzes every change to see if a business rule needs to run to, for instance, reassign a task to the finance department now that billable work has been completed.

JobTraQ® delivers Open Interfaces, an Open Data Model, and a comprehensive set of fully Authenticated Web Services (XML, SOA) Integration Points allowing easy integration with third party systems including: ERP systems, PDM applications, Supply chain management, Web/Database/Back Office, Inventory, Accounting and other third party products. JobTraQ allows attaching files to tasks, or use the hyperlink feature to archive attached files in an external document management system. This is accomplished by a system setting and requires no programming.

JobTraQ® includes flexible integration with the Active Directory, or other LDAP based authentication systems. Allowing individuals inside your organization to authenticate through the active directory eliminates the need to maintain multiple logins when JobTraQ® is added to a network. However, clients or individuals outside your organization can still have access to the system without being integrated into your internal active directory. Additionally, the JobTraQ® integration does NOT require any active directory accounts, administrative or otherwise.

JobTraQ® provides a complete, searchable, centralized contact database which is directly integrated into the system's powerful task tracking functionality. JobTraQ® enables system administrators to mass import current contact information from a database, spreadsheet, or text file in just minutes and then manages it all from one place with a full audit trail. In addition, system administrators can use powerful and granular permissions and groups to specifically define what each user is allowed to do within JobTraQ®. The flexible built-in permissions can be applied to fields, statuses, required fields, task types, features and screens.

Specific business processes or workflows can be modeled and automated with JobTraQ®. Match the flow of processes with ease using JobTraQ's dynamic workflow engine. Rules are created with a criteria-action set. Criteria and their associated actions can be specified with drop down list boxes. Simple formulas are possible but optional so no programming is required to re-route tasks or change built-in or custom fields associated with them. For example, JobTraQ® can automatically send tasks to the billing department once they are completed - never again worry work is not being billed.

JobTraQ® is the leading edge of human to human workflow. In 2006, Gartner reported this on the state of Business Process Management: "Firms that have implemented Business Process Management Suites with strong Human to Human (H2H) functionality have seen 15 to 150 percent gains in productivity and efficiency." Contact Swift Software today and get started with JobTraQ®!

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