



# Key Features and Applications Overview

## Outlook Integration

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.

## Full Audit Trail

JobTraQ™ keeps a complete audit trail of all changes to jobs and contacts. This allows you to find out who changed a record and when they did it. This feature provides a vital tool for Sarbanes-Oxley compliance, as well as being useful in day-to-day business.

## Project Management & Control

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 & finish dates, notes, resources and data  
Import/Export from/to other programs  
View project plan by filters such as: date; client; project or job type; billing and invoice specifications and more, including any custom fields you create.

## Data Integration

JobTraQ™ Interfaces and XML Integration Points are in development that will allow you to easily integrate with third party systems including: ERP systems, PDM applications, Supply chain management, Web/Database/Back Office, Product development process and more.

## Easy Customization

You can customize JobTraQ™ to fit your business's specific needs:

- Do you need to track your critical information through multiple steps?  
Just create a custom status for each step!
- Do you need to associate an invoice number with each specific job?  
Just create a custom field!
- Do you need to create and oversee different types of projects or tasks?  
The 'Job Types' field allows an infinite variety!
- Do you need to track your customers' critical data?  
Just create a custom field!

## "Anytime, Anywhere" Web-Based Access

JobTraQ™ uses web-based technology, so your users can access the system anytime, from anywhere.



### Active Directory Integration (Single Sign-On)

JobTraQ™ includes flexible integration with the Active Directory, or other LDAP based authentication systems. By allowing you to specify that individuals inside your organization can authenticate through the active directory you eliminate the need to maintain multiple logins when you add JobTraQ™ to your network. However, you can still let clients have access to the system without being integrated into your internal active directory. Additionally, the integration does NOT require you to provide JobTraQ with any active directory accounts, administrative or otherwise.

### Contact Management and User Access Control

JobTraQ™ provides a complete, searchable, centralized contact database which is integrated with the system's task tracking functionality. Gain instant access to your customers, clients and staff information. JobTraQ™ enables system administrators to import current contact information from a database, spreadsheet, or text file in just minutes and then manage it all from one place with a full audit trail. In addition, system administrators can use permissions and groups to specifically define what each user is allowed to do within JobTraQ™.

### Flexible Workflow

If you have specific processes that your business follows, JobTraQ's workflow features can help you automate them. Match the flow of your processes with ease using JobTraQ's dynamic workflow engine. For example, you can configure JobTraQ™ to automatically send jobs to your billing department once they are completed - never again worry your work is not being billed.

### Data Organization & Management

JobTraQ™ stores, organizes, and manages data in a central location allowing users to quickly locate and utilize specific information.

### Checkpoints

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, you can 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 you can also build in management alerts if critical dates are within the predefined "risk distance". In other words, you may also want to 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.

### Data Access

JobTraQ™ allows users to access data based on defined, described and varied levels of permission. Permissions can be established in terms of: No Access, Read-only, or Full Control (or Read/Write/Append for the special "append text fields").

### Data Control

Fully featured and intuitive web-based interface  
XML API (Web Services, SOAP under development)  
Windows based contact manager and system administration tool (accesses JobTraQ™ data via the built-in and authenticated Web Services Interface)  
Mass import tool for contacts (clients, staff, etc.)  
Utilize database functionality and open data model for direct data import / export.  
Link files as to project plans or to specific tasks



### **Instant Email Notification**

JobTraQ™ features include instant email notification upon the creation of, or changes made to, a job. Administrators can easily define the rules for which users receive notification. In addition, when a job is overdue, JobTraQ™ also sends email reminders to the assigned job owner, (and/or project manager or other assigned recipients), keeping projects on track.

### **Robust Reporting**

JobTraQ™ provides complete HTML and CSV reports on jobs, contacts, and scheduled jobs. These reports allow you to easily view, print, or load your information into other programs such as Microsoft Excel or Crystal Reports. In addition, JobTraQ™ includes a custom-report interface which allows developers to construct more advanced reports based upon your specific business needs.

### **Site security features include:**

Username/Password authentication  
Per-user, feature-by-feature, and field-by-field access control  
Read-only and no access controls to keep identified users from seeing certain data fields in the Interface or notifications  
Granular administrative privileges

### **Server security features include:**

SHA-2 (Secure Hash Algorithm 2) one way password encryption  
Platform support for Secure Sockets Layer (SSL)  
Platform support for Integrated Authentication  
Platform support for I.P. Filtering

### **Change Management and Implementation Features:**

Collaborative Change Management  
Collaborative Program Management  
Collaborative Design Reviews  
Collaborative System Engineering  
Collaborative Target Setting  
Collaborative Value Modeling