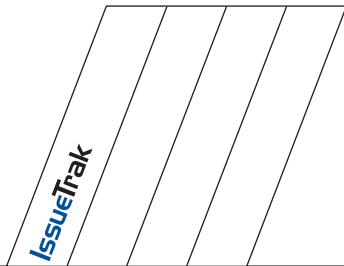
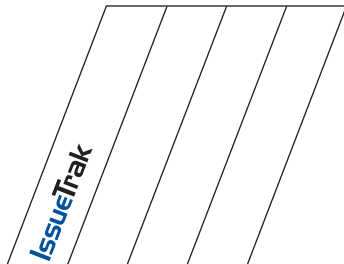




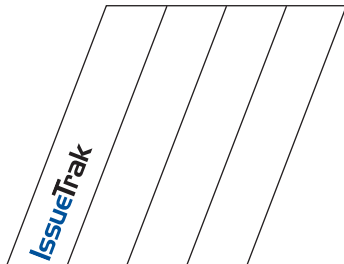
Use this checklist to see how IssueTrak stacks up against your requirements... and the competition.



Issue Management					Notes
Automatic routing of issues based on multiple criteria	☐				
Assign issues to groups or individuals	☐				
When assignee is unavailable, automatically reroute issues	☐				
Automatic escalation based on pre-defined business rules	☐				
No license required for users to assign tasks	☐				
Group related issues into a global issue and handle as one	☐				
Recurring issues can be scheduled ahead of time	☐				
Require completion of specific tasks before issue closure	☐				
Issue Submission					Notes
Easy-to-use, customizable web interface	☐				
Users can submit issues by web, email or phone	☐				
Supports attachments and embedded images	☐				
Pre-defined templates for common issues	☐				
Issue submit screen is customizable	☐				
Process Management					Notes
Apply a standard process to any issue with a single click (e.g., New Hire)	☐				
Configure tasks for sequential or parallel completion	☐				
Set task due dates and reminders	☐				
Facilitates compliance with regulatory and statutory requirements, such as Sarbanes-Oxley, HIPAA	☐				
Work ow					Notes
Delegate pre-defined and ad-hoc procedures using tasks	☐				
Ensures work ow procedures are replicable and auditable	☐				
Assign tasks to any user (not just a licensed user)	☐				
Initiate pre-defined processes such as change management or new hires	☐				
Reporting					Notes
Pre-defined standard reports	☐				
Search results display in a report format or can be exported to Excel	☐				
Advanced Report Writer allows you to run complex queries against the database	☐				
Reports and saved searches can be scheduled and distributed automatically	☐				
Data is filtered automatically based on user permissions	☐				



Dashboard					Notes
Real-time data displayed in colorful graphs and charts with drill-down capability	☺				
Customized display shows open issues by issue type, organization, severity, assignee, SLA compliance and more	☺				
Data can be filtered by organization, department or user	☺				
Filtered dashboard available to all users (not just licensed users)	☺				
Knowledge Management					Notes
Articles can include file attachments, embedded images and hyperlinks	☺				
Public, private and organization-specific access levels	☺				
Email knowledge base articles to any user	☺				
Generate new knowledge base articles from issues with one click (can edit before publishing)	☺				
Project Management					Notes
On-time and on-budget overview	☺				
Distribution list allows updating key personnel outside of project team	☺				
Automatic reminders on project due dates	☺				
Link issues to projects	☺				
Incoming Email Processing					Notes
Submit issues by email	☺				
Email reply automatically adds note to issue record	☺				
Self-register via email	☺				
Assign inbound emails based on keywords	☺				
Alerts/Notifications					Notes
Automatic notifications for updates and changes	☺				
Reminders for due dates, project deadlines and service-level compliance	☺				
Distribution list notifications	☺				
Active Directory Management					Notes
Import and update users automatically from Active Directory	☺				
Single sign-on: instant user access through Active Directory; no extra password required	☺				
Supports multiple Active Directory domains	☺				
Active Directory password reset capability	☺				
Smart Card/CAC integration	☺				
Service Level Agreements (SLAs)					Notes
Define service levels using your terms and rules	☺				
Automated reports with compliance notifications	☺				
Pause SLA when waiting for customer response	☺				



Time Tracking					Notes
Track time and labor hours	☺				
Start and stop the clock on issues	☺				
Adjust time calculations based on your hours of operation (e.g., for escalation purposes)	☺				
Route issues to technicians based on time of day (i.e., Follow the Sun)	☺				
Displays local time for every IssueTrak user	☺				
Surveys					Notes
Send surveys after every n th issue	☺				
In-depth analysis and Itering	☺				
Deploy surveys via IssueTrak, email or web page	☺				
Asset Management					Notes
Integrated asset and inventory management	☺				
Associate PC and non-PC assets with issues, users, locations and customers	☺				
Supports software purchases, licensing compliance	☺				
Zero-footprint PC audit with fast, lightweight scans	☺				
Unlimited assets and asset classes at no charge	☺				
Check-in/check-out function for loaning items like AV equipment and laptops	☺				
Billing Module					Notes
Generates work orders and invoices for your products and services	☺				
Track billable time throughout issue lifecycle	☺				
Supports ad-hoc rate adjustments, non-billable, taxable and non-taxable line items	☺				
Flexible Excel (CSV) export tool	☺				
Self-Service Portal					Notes
100% web-based interface; no desktop software	☺				
Customers can check status, update issues and view the knowledge base	☺				
Data is Itered each customer or user sees only the data related to them	☺				
Allow users to self-register, update personal information, reset passwords	☺				
Unlimited users and customer portals (customized logos and color schemes optional)	☺				
Customization Options					Notes
Different submission interfaces for different issue types (such as IT, HR, Finance)	☺				
Customize web interface, including color schemes, titles and logo images	☺				
Add custom elds to issue, asset, user and organization records	☺				
User-de ned elds can be optional, required and/or private	☺				

