

checklist



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	✓				
Automatically reroute issues when assignee is unavailable	✓				
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 screen is customizable by Type	✓				
Process Management					Notes
Apply a standard process to any issue (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	✓				
Workflow					Notes
Delegate pre-defined and ad-hoc procedures using tasks	✓				
Ensure workflow 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 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 and private and organization and group-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	✓				
Automatically categorize and assign inbound emails	✓				
Use email tokens to set issue specific data	✓				
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
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")	✓				
Display local time for every Issuetrak user	✓				
Surveys					Notes
Send surveys after every issue (or set number of issues)	✓				
In-depth analysis and filtering	✓				
Deploy surveys via Issuetrak, email, or web page	✓				
Asset Management					Notes
Integrated asset management	✓				
Associate PC and non-PC assets with issues, users, locations, and customers	✓				
Supports software purchases, licensing compliance	✓				
PC audit with fast, lightweight scans	✓				
Unlimited assets and asset types 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	✓				
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 filtered – 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)	✓				
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 fields to issue, asset, user, and organization records	✓				
Custom fields can be optional, required, and/or private	✓				
Technology					Notes
100% zero footprint, web-based solution - no client-side software required	✓				
No ActiveX controls	✓				
Built on Microsoft SQL Server and IIS technology	✓				
Source code included	✓				
Visually impaired customers can use screen-reading technology	✓				
API allows issues to be imported from and exported to other systems	✓				
Integrated chat	✓				
Security					Notes
Set password policies and challenge questions	✓				
Access to Issuetrak can be controlled by Active Directory	✓				
Supports SSL encryption	✓				
Supports smart card login, including common access cards (CAC)	✓				
Audit Trail					Notes
Audit trail for all issues and changes	✓				
Facilitates compliance with Sarbanes-Oxley, HIPAA, GLBA, and other audit regulations	✓				

Implementation					Notes
Choose Cloud option or On-Premises installation using your servers	✓				
Can be up and running in as little as 60-90 minutes	✓				
Easily control which features are enabled using checkboxes	✓				
JumpStart program provides training and configuration assistance with expert consultants	✓				

Maintenance Plus					Notes
Unlimited technical support by phone, email, live chat, and web	✓				
Online access to all new releases and product updates	✓				
Critical support available after business hours	✓				
Extensive knowledge base with helpful resources and solutions	✓				

Pricing					Notes
Free users can be given any combination of 55 user permissions	✓				
No charge for people who submit issues, receive notifications, assign or are assigned tasks, use the knowledge base, create or view reports, access dashboard, manage projects, edit knowledge base articles, and more	✓				
Pay only for users who assign issues, are assigned issues, enter issues for others, or perform system administration	✓				

