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How is JobTraQ Licensed?

JobTraQ® is licensed by Assignees. Everyone else is free. Anyone can have a JobTraQ account and use it to request tasks, run reports, or access any other features you want to give them – without requiring an assignee license. This makes JobTraQ licensing very favorable for teams that want to track tasks and projects being completed for a large audience of clients or stakeholders. They can add hundreds, thousands, or even hundreds of thousands of client contacts without purchasing any more licenses.

In order to run JobTraQ you will need a JobTraQ base license. We can provide a hosted license on our SaaS (Software as a Service) platform, or you can run JobTraQ on your own servers if you prefer. JobTraQ SaaS is available in monthly and annual subscriptions, and on-premise servers can run under annual subscriptions or permanent licenses. Our hosted SaaS offering is delivered through our own secure, state of the art, NIST 800-53 compliant Commercial Data Center, which offers a 99.9% application uptime guarantee with all plans.

Whether you run JobTraQ on your own servers, or have us deliver it from the cloud, you will still need to determine the number of assignees you will need. An “Assignee” is a user or other contact type (such as an Asset, a Queue, or an Organizational Unit) that will have more than 5 open tasks assigned to it at any one time. You can assign up to 5 tasks to anyone without needing a license. If they close two tasks, you can assign two more; the limit only applies to open tasks. But if you need to assign a 6th open task to that unlicensed assignee then JobTraQ will alert you that the task cannot be assigned to them until they close some tasks or you add them to the list of license users.

If you allocate an assignee license to someone, you can assign an unlimited number of tasks or projects to that person. An assignee license can be allocated to an Individual (a worker, etc), an Organizational Unit (a department, a sub-contractor, etc), or an Asset (a conference room, a production machine, a truck, etc), or to a Queue which various workers can pull tasks from.

You might want to assign tasks to a Queue or Organizational Unit in some cases. JobTraQ allows you to let various managers and workers see the tasks in a queue, and also allows you to control who can assign tasks to that queue (i.e. make a request of that team). This can be handy for larger scale workflows where, for instance, you may want to have new Benefits Inquiries get routed to a Human Resources Queue, which could notify a team lead to assign the tasks to the next qualified individual that

becomes available. Or, you could let the entire team of professionals access the Queue, and simply retrieve the requests themselves as they become available. If you assign a task to an Organizational Unit (for instance Accounts Payable) then everyone under that Organizational Unit will be able to see the task and work on it when they are able. This is less flexible than using queues, but is often preferred for simplicity in smaller teams.

Therefore, if you have 3 teams of 5 people, and would like to assign tasks to a Queue for each of those three teams, or to any of the 15 workers, you would need a total of 18 assignee licenses, regardless of how many clients or other contacts you may want to associate with your tasks and projects, provided those other contacts will never have more than 5 tasks assigned to them.

There are several modules available with JobTraQ, such as our popular Business Intelligence Module (wizard based, graphical, scheduled, and self-service ad-hoc reporting) and our Mobile Module. These add-ons are not user based. You simply purchase the add-on modules that you need, and they become available to every user in your system.

Assignee licenses are applied to specific named users, but can be re-allocated should a named user leave or no longer need to exceed 5 open tasks. Any feature can be enabled for a non-assignee user, including complete system administration, so the only purpose of an assignee license is to enable that assignee to receive more than 5 open tasks at a time.

What can I do from the JobTraQ Mobile interface?



JobTraQ® Mobile is an optimized user interface that allows users to access JobTraQ from any supported handheld web browser using a wi-fi or cellular connection. While you can run the full version of JobTraQ from most handheld devices reasonably well, JobTraQ Mobile presents a lightweight and easy to use alternative for on-the-go users who need rapid and secure access to their tasks and projects. Mobile users can quickly access their upcoming tasks and appointments in the mobile optimized Agenda view, can look up contact information from the JobTraQ server, and can quickly access their complete task list. In addition, mobile users can start, pause, and stop task timers, create and edit tasks and appointments, and even download and view attached files.

The JobTraQ Mobile interface complements the capabilities of JobTraQ's Task Management and Workflow Software making it an excellent fit for field services and other distributed teams regardless of whether they are sending their workers around town or across the globe. It can be easily configured to integrate with Google Maps and other online services that help field workers stay on track and connected to the information they need to get their job done. JobTraQ Mobile is also great for busy team leaders who think of "one more task" that they need to assign to someone just before they get on a plane. Finally, it is perfect for anyone who likes the freedom of traveling light while staying connected to the productivity-driving power of JobTraQ.

JobTraQ Mobile first shipped with JobTraQ version X5.12.5 and is a fully supported module. It is compatible with all phones, PDAs, and tablets running Apple's iOS 3 or later, Google's Android 1.5 or later, BlackBerry OS 6, and the Bolt web browser for BlackBerry OS 5.

Can I run JobTraQ server on my own hardware?

Yes, we license JobTraQ® in 3 ways:

- 1. Permanent On-Prem License with Optional Annual Maintenance (1st year required)**
You can run the software on any server you want. Some Editions come with additional non-production licenses for development and staging, etc.
- 2. Annual On-Prem Subscription**
This all inclusive model gives you a one year license (maintenance is already included) to run the software on any server you want. Some Editions come with additional non-production licenses for development and staging, etc.
- 3. SaaS (Software as a Service)**
This all inclusive hosted model runs from our secure data center, and includes the web server(s), database platform, disk space, support and maintenance services you will need to run JobTraQ from anywhere. There is a 3 month minimum commitment and you can migrate to an on-prem system at any time.

What is “Task-Centric” Task Management?

First, let’s consider alternatives:

- 1. Project Centric Systems:** Some so called task management systems are really Project Centric Systems. These systems operate from the assumption that everything you do or assign to someone is part of a project. JobTraQ® certainly supports the creation, delegation, and management of projects and sub-projects but JobTraQ doesn’t force you to create projects in order to get a task defined and assigned. Project Centric solutions often struggle to effectively support ad hoc tasking because those independent tasks are not often part of a predefined project. As a result it is not intuitive for a manager to have to create a project just so they can assign a simple task to a worker, a team, or an asset. Projects by nature have a predefined start and a finish, or at least they should, and as a result Project Centric Task Management Software can be equally clumsy when trying to manage ongoing business processes. In a typical business process, an instance of that process may have a defined start, or various possible entry points, and an end, or various possible exits, but the process itself is ongoing, often based on some type of variable input, such as a customer request or order. Trying to manage these kinds of processes as if they were projects, or dividing them into projects, is unintuitive and risks critical items being overlooked. Project Centric systems also typically make the project the center of the reporting universe, defining metrics according to project performance indicators lacks effectiveness and proper decision support data for managers leading teams that complete ad hoc or custom work or that work within repeatable business processes or workflows.
- 2. Process Centric Systems:** Process Centric Systems are those that assume that every item entered is an instance of a predefined business process. This approach lacks needed flexibility

for managers that view their internal projects and ad hoc tasks, that may in fact support those critical business processes, as being equally important to execute correctly and on time as their predefined business processes. Having to define a process for ad hoc tasking is clunky at best, but also lacks the workflow agility and diminishes the overall visibility teams often need in real world situations.

So then what is a Task Centric System?

In a Task Centric System the task is the critical element and business rules, ownership, assignment, delegation, access, and the unique data attributes of each task determine the course of that task. A simple ad hoc task can have equal visibility with a critical path project element if that is warranted. A project's sub task that suddenly meets the criteria of a predefined business process can enter that process as a business rule runs, ensuring for example that anytime a task exceeds a certain cost threshold it will be sent for review, or that a parallel task will be created for gathering needed financial approvals. Determining the Resource Utilization of a worker, team, or asset in a task centric system is much simpler and much more reflective of fact. Project Centric Systems often create artificial availability of resources because they do not account for the demand that unrelated recurring tasks, or other projects, or even ad hoc tasks with higher priorities may be placing upon those resources. A task centric system can give you the full picture of team metrics, showing true on time delivery statistics across the spectrum of things a multitasked team or worker may be assigned to during a period of time.

In short, the answer: JobTraQ is Task Centric. A complete task management system for managing teams, processes, projects, and programs.

What is “Emergence Theory” and how does it apply to Business Process or Task Management?

Those familiar with emergence theory as it exists in science may find it troubling that business processes are being compared with physics, but the similarities are somewhat obvious to the astute observer. Lets consider four foundational concepts of emergence as applied to science:

1. Ontological physicalism: All that exists in the space-time world are the basic particles recognized by physics and their aggregates.
2. Property emergence: When aggregates of material particles attain an appropriate level of organizational complexity, genuinely novel properties emerge in these complex systems.
3. The irreducibility of the emergence: Emergent properties are irreducible to, and unpredictable from, the lower-level phenomena from which they emerge.
4. Downward causation: Higher-level entities causally affect their lower-level constituents. (el-Hani and Pereira, 2000, p.133)

Now lets take some liberties and rewrite this as if it applied to tasks, projects and processes:

1. Task Centric: All that exists in human to human business processes are workers and the tasks recognized as valuable by others and their aggregates (or workflows).
2. Project and process emergence: When aggregates of tasks attain an appropriate level of organizational complexity, genuinely novel projects and repeatable processes emerge from within these complex systems, and if measured and managed, they may become efficient.
3. The irreducibility of the emergence: Emergent business processes are irreducible to, and unpredictable from, the lower-level tasks or workers from which they originally emerged. (This will surely spawn some debate, but don't respond too quickly!)
4. Downward causation: Higher-level entities (business goals and objectives, higher level management, etc.) causally affect their lower-level constituent (the tasks and workers that get them there).

So, do you see how this relates to Business Process? The scientific journey of emergence theory is one that starts with bits of iron and nickel, then sees steel, then patterns, then a wheel, and then a car, and so on. One of the challenges of reverse engineering a product is that looking at a finished good will rarely lead one to a proper appreciation of the trial and error that went into certain subtle design choices that influenced the final product. And, without that information you end up with a similar looking item with similar measurements – a product that appears “finished” but is in fact only just beginning its development process, though disadvantaged by appearing complete.

Entrepreneurs often start out harnessing creative energy in order to assemble a team of raw material, coalescing those elements into a common vision of a finished good and exciting the teams until they form complex systems that produce a finished good. That finished good is often far more refined and complex than the original vision called for, and also quite often very different as well. Let's say that entrepreneur wants to build value into their company by transferring an organizations structural strengths from those dependent on human competence to those dependent on systems and processes. And let's say that this person has hired you to help them do that, but let (fairly) assume that they are also now fully entangled in managing operations and want you to figure out how to bring these organically developed processed into a visible, manageable, and repeatable system of automation. Would it make more sense to reverse engineer the finished good, or to start with the particles?

This is where Agile Task Management Software like JobTraQ® comes in. By enabling you to quickly define, delegate, and distribute tasks in every area you complete your discovery work you find that work becoming more visible, searchable, accountable and measurable. This is the scientific way is it not? Observe the facts, as they are, recognize the systems that are in place, and examine interactions until higher level system can be defined as they are, as opposed to how we thought they were from various limited vantage points.

While well understood and well defined business processes will always benefit from proper pre-automation planning, emergence is incredibly beneficial in the mapping of organically developed or evolving processes – especially when facilitated by an agile system like JobTraQ. JobTraQ enables subject

matter experts or business analysts to quickly build custom forms, rules, and metrics around ad hoc tasks, processes, or project patterns. These agile rapid prototyping and deployment capabilities enable an organization to quickly take ground as they work through a maze of complex systems leaving behind a rapidly increasing set of real-time data about what is actually happening in a business ecosystem. This veritable gold mine of emerging data supports the application of changes in small increments with short feedback loops – like hooking gauges to every critical component in an engine allowing yo to instantly measure not only the impact on output that any change delivers, but also the changes in pressure on any area of the business in real time.

Where can I get more information?

For more information about JobTraQ, go to www.jobtraq.com.

For technical questions, go to www.jobtraq.com/support.

For licensing or sales questions, please contact our sales team at sales@jobtraq.com.