

Job Control

Job Control was developed to track the processing of returns/jobs within the offices of the accounting professional. The job tracking process is initiated by a client's request for the completion of a return/job and the processing begins with the recording of the job in the Job Control database. For each job, the Client's Name, the date of the request (Date In), the type of Return requested and the name of the Employee Responsible for the client's account are required. The program also allows for the Assignment and Sub-assignment of each job to other staff members. When a job is started, the Start Date is recorded. When the job is completed, the Finish Date is recorded. Once the job has been completed, the job is checked and the Checked Date is recorded. When the job is sent out, both the Date Out and the Method of Disposition are recorded.

Features

Layouts: Layouts determine the content and appearance of the job records in the job grid. The Job Control program is provided with 4 pre-programmed layouts and each user can also create and save up to 12 custom layouts. These layouts allow each user to view only those jobs that are of particular interest. In order to develop their own custom layouts users may:

- Hide or Show Columns.
- Sort Columns in Ascending or Descending Order.
- Rearrange the order in which columns appear.
- Select returns/jobs to be displayed based on the value contained in a column. Selection criteria can be used individually (Show only T1 returns) or they may be combined (Show only T1 returns and show only jobs that have been assigned to me).
- Save a layout as your default layout. This layout will be used as the initial layout each time that the program is opened.
- Edit existing grid layouts as necessary.

Find: The displayed job grid can be searched for the existence of jobs that match a user provided value in any given column.

Reports: Job Control can prepare 6 different reports. All reports are provided in preview mode where they can be reviewed before directing them to the default printer. These reports can also be exported in a variety of different file formats where they may be opened with other application software. The available reports are:

- Client Report - A listing of all jobs, sorted by client.
- Assignment Report - A listing of all jobs that have been assigned to a given employee, but have not yet been completed.
- Employee Reports - A menu allows the user to produce reports based on user selected criteria such as:
 - Individual or all employees.
 - Single job type or all job types.
 - Job status (employee responsible, employee 2nd-responsible, employee assigned, employee sub-assigned) (date-in, date-started, date-required, date-out).
- Progress Report - A cumulative count or daily count of jobs by date or by employee.
- Average Days Report - An analysis of the number of days required for employees to complete job tasks. This is accomplished by counting the number of days between the recorded In, Start, Finish, Checked and Out dates.

Administrative Tasks: The system administrator has access to password protected menu items that are used to define the default values that will be used by the Job Control program. Pre-defined values that can be determined by the administrator include:

- Return Codes - A code and a description are associated with each type of return/job (T1, T2, CAIS, Financial Statement, etc.).
- Disposition Codes - A code and a description are used to define the possible methods by which a return/job may be disposed. Examples of Disposition Codes include Mailed To Client, E-Filed, Taken By Client, Faxed To Client, Hand Delivered, E-Mail To Client.
- Employee Table - The employee table is made up of an Employee Code and the Employee Name. The Employee Code serves as a shorthand representation to conserve screen space.
- Archive Completed Jobs - This task will flag finished jobs (those that have a Date-Out that is equal to or prior to the date specified by the administrator) as Archived. The archive function can be performed as often as is deemed necessary. Jobs that have been flagged as Archived remain in the database for viewing and historical reporting purposes.

The administration features also include a tool to recover previously deleted jobs and the ability to change the administrator password.

Automatic Program Updates: The program update feature allows for the downloading of program updates without user assistance:

- Program updates are downloaded from our website by our automatic update agent software.
- Job Control users with many computers can reduce Internet traffic by designating 1 computer as the update server for all other Job Control users.