

Vision n




















Author: Laila Hajyani

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Created: May 20, 2008

Legend

Legend	Description
Green Back Color	Task is in Working
Red Back Color – ‘T’ column	Task is overdue
Yellow Back Color – ‘T’ column	Task will be overdue in 2 days
Red Fore Color	Task is Severe or High Priority
Blinking  in Inbox	Represents a new Message
Blinking  in Inbox	Represents a new Message (Communication to Client)
	Click to go to Communication/History and change assignment/Multi-assign
	Click to edit Task Details
	Click to put the Task in Working
	Click to put Task on Idle
	Click to put Task on Hold (Reminder/Expiry Date Required)
	Click to Complete the Task (Actual Problem and Resolution required for Support Tasks)
	Click to send a Quick Message
	Click to apply filter
	Click to clear Filters and go to default view
	Click to see Calendar
	Click to Add to the list
	Click to Delete from the list
	Click to see Attachments
<input type="checkbox"/> Display Communication to Client	Check if the communication can be viewed by Client
<input type="checkbox"/> Current Status	Check if the communication is the Current Status of the Task
 View All	Click to View Corresponding Outlook Ticket History
<input type="text" value="Browse..."/>	Browse the file for attachments
<input type="button" value="Reply"/> <input type="button" value="Reply All"/>	Click to Reply To/Reply All Recipients in the Communication
<input type="button" value="To"/> <input type="button" value="Cc"/> <input type="button" value="Bcc"/>	Click on <input type="button" value="To"/> to add the Recipient to To list Click on <input type="button" value="Cc"/> to add the Recipient to CC list Click on <input type="button" value="Bcc"/> to add the Recipient to BCC list
<input type="button" value="Save"/>	Click to Save/Update a Task
<input type="button" value="Sub Task Assignment"/>	Click to Assign a sub task to individual or groups
<input type="button" value="Save & Communicate"/>	Click to Save and get redirected to the Communication Page of the Ticket
<input type="button" value="Clear"/>	Click to Clear the text
Associate yourself to this task	Click to associate yourself to the task. You will always be added to the task recipient list by default
<input type="button" value="Update/Send"/>	Click to add to history or communicate to others
	Click to set recurrence on the task. Only Owner can add recurrence to the task. A subtask gets created every time the recurrence occurs.
Recipient: <input type="text" value="Client Contacts"/>	Select Client Contacts on Communication Page to communicate to client
	Represents a group. Hover to see the name of the group
	Represents an individual. Hover to see the name of the individual
S in ‘T’ Column	Represents Support Type Task
D in ‘T’ Column	Represents Development Type Tasks
I in ‘T’ Column	Represents Implementation Type Tasks

Status

Only Assigned To and Owner can change Status of a task and a sub task

Internal Status

Status	Description
Working	Task is in progress
Idle	End of the day or while switching task, the current working task should be put in idle
Hold (Reminder Date Required)	If Waiting on someone can be removed from My Task Queue to Hold Queue by putting the task on Hold with a reminder/expiration date. On this date the task returns to My Task Queue
Waiting on Employee	If Waiting on another employee, select the status and name of the person
Waiting on Client	If Waiting on Client for more information or response, choose this status
Completed	Task is accomplished
Closed	Support and Project Tasks once completed goes to the owner's queue and is marked closed

Client Status

Status	Description
Working	Tasks in Working, Idle, Hold, Waiting on Employee show as working to Clients
Pending	Tasks with a status of Not Started shows as Pending to Clients
Waiting on Client	Tasks that needs further clarifications or communication from client are put as Waiting on Client
Completed	Task is accomplished
Closed	Clients can close a task after reviewing the resolution.

Priority

While creating a task, a user can choose the priority of the task. Only Assigned To and Owner can change Status

- Severe
- High
- Normal
- Low

Reference Types

While creating a task user can choose from the following references

- Server Crash
- Product Crash
- MEDITECH Job Issue
- Patient Critical

Server Crash: If the server where the products are running has a problem, user can choose this option. Such tasks are automatically marked with a Severe Priority.

Product Crash: If the product in use crashes and does not work, user can choose this option. Such tasks are automatically marked with a Severe Priority.

MEDITECH Job Issue: If MEDITECH job has problems, user can choose this option. Such tasks are automatically marked with a Normal Priority.

Patient Critical: If any patient information is missing or incorrect, user can choose this option. Such tasks are automatically marked with a High Priority.

Upgrade/Migration

While creating a task user can choose from the following Upgrade/Migration

- MEDITECH OS Upgrade
- MEDITECH Upgrade
- MS OS Upgrade
- SQL Migration
- Hardware Migration

MEDITECH OS Upgrade: MEDITECH Operating System Upgrade

MEDITECH Upgrade: MEDITECH Application Upgrade, this includes an upgrade to any application, or a ring release to a suite of applications.

MS OS Upgrade: Microsoft operating system upgrade, typically involves a machine of server status. This includes, but is not limited to, the application servers (e.g. Galaxy and Galactica), integration servers (e.g. ASTRO) and internet information servers.

SQL Migration: Involves an upgrade of the Microsoft SQL software. This could include both an in-place or cross-server upgrade. (E.g. SQL 2000 to SQL 2005)

Hardware Migration: Involves moving both neutral software (non TSG software e.g. Microsoft software) and TSG centric software from one machine to another. This involves re-installation and reconfiguration of the software. Typically there is some downtime associated with this exercise.

Entry Type

While creating a task, a user can choose the Entry Type of the task. Only Assigned To and Owner can change Entry Type of the task. Following are the Entry Types available for selection

1. Bug
2. Configuration
3. Custom
4. Enhancement
5. General Task
6. Project
7. QC
8. Recurring/Maintenance
9. Support

Entry Type- Bug:

A programming change in the core code is required to resolve the issue

- Bug ticket types can be logged immediately, or a Support type ticket can evolve into a Bug.
- The product manager in conjunction with the product technical lead must determine whether the bug has a high or low impact.
- A High impact bug implies that an immediate patch must be made available for resolution, and there is no work-around for the issue.
- Low impact bug implies that a patch can be coded during the next release promotion. (That there is a work-around for the issue)
- A high impact bug, by definition, should be regarded as a global bug; however it will be the prerogative of the product manager and product technical lead to decide on which sites should receive the patch.
- When an issue is deemed a bug it will be necessary to identify the product version in which the bug occurred.
- A Bug can be both Internal or External in Nature

Entry Type- Configuration:

A Configuration type ticket will be logged when a “site specific configuration setting” is determined. Standard configuration settings do not need to be logged as tickets.

- Configuration type tickets are not to be confused with *Customization* tickets which are tickets in which site specific code changes are required.
- Configuration tickets must be logged against the client site at which the particular configuration setting was made. The body of the ticket can be used as a further explanation as to why a particular configuration setting was made.
- During upgrades Configuration type tickets will be reviewed in order to preserve a site’s particular configuration.
- Configuration type tickets will typically be exposed via a data-grid on a PMP.
- Note! Configuration type tickets must be logged as Internal and will not be exposed to the Customer.

Entry Type – Custom:

A programming change in the core code is required to resolve the issue. The change will never, or at least not immediately, become part of the standard code. A custom may be billable or not, and is based on the board's discretion.

- Custom ticket types can be logged immediately as such, or an issue can evolve into a Custom.
- When an issue is deemed a custom it will be necessary to identify the product version.
- Note! Customs, per site will have to be retrofitted when deploying a new version of the standard code, if the new code does not cover the custom.
- An Custom ticket can be both Internal or External in Nature

Entry Type – Enhancement:

Additional functionality via a programming change to the standard core code is required to resolve the issue.

- Enhancements are typically approved or declined during the product's cyclical "Release Request"
- When an issue is deemed an enhancement it will be necessary to identify the *product version* on which the enhancement was requested.
- When an enhancement is approved it will be necessary to identify the *future version* for which it has been approved.
- If the enhancement originated externally the client will be informed that the issue has evolved into an enhancement. The client's issue will be closed and an enhancement ticket will be logged against TSG. The originating client/s will be captured in the description field in the enhancement ticket.
- During the Release Request all "Open" enhancements will either remain "Open", be "Approved", "Declined".
- After the Release Request all Approved tickets must be fully specified via ESDs.

Entry Type – General Type:

Used primarily for administration type tasks.

- General Tasks can only be Internal in nature.
- This type will also be used as the catch-all entry type in the event of having to log a task, but not truly understanding the type that it should be.

Entry Type – Recurring/Maintenance:

This is an open ended ticket that is used for issues that arise on a regular basis, or require regular involvement.

These tickets can only be Internal in nature.

Entry Type – QC:

QC type ticket originates during the Quality Control phase of product development. The new version could be an entirely new product, or one undergoing an upgrade.

- A product manager will be the only resource who will be able to create tickets of this type.
- When a QC type ticket is created it will be necessary to identify the QA round on which the QC ticket originated. This is for trending purposes.
- A QC ticket type can only be Internal in Nature

Entry Type – Project:

A ticket that originates from a project plan.

- A ticket of type Project will be created for every unique step identified on the project plan.
- The PMO is responsible for creating project tickets.

Entry Type – Support:

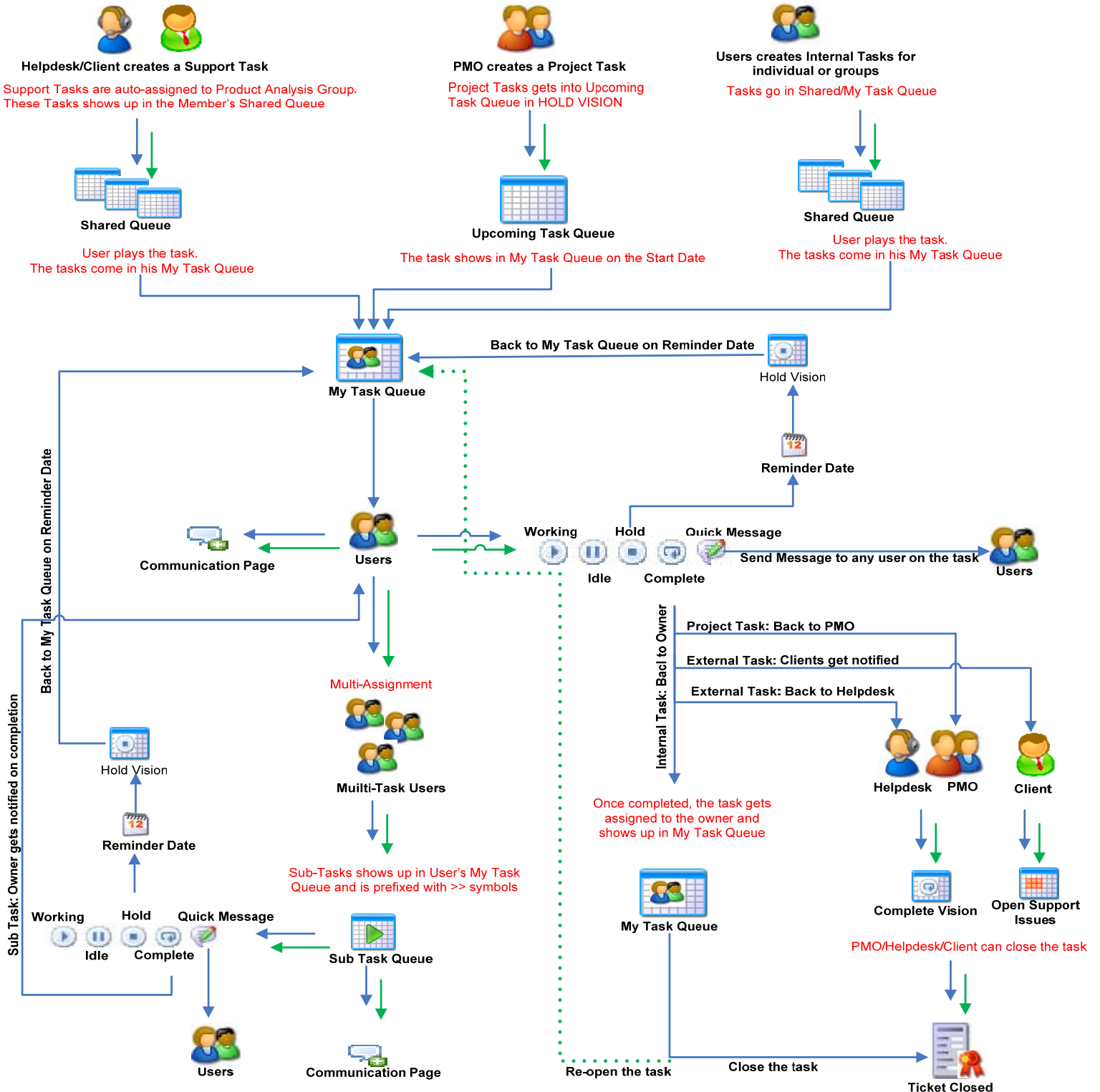
Assistance other than a core code change was required to resolve the issue. A support resolution involves a discreet solution to an issue that has occurred.

- The majority of tickets will originate as type Support.
- Examples of this type of support could include:
 - An explanation of a particular application feature can be sought
 - A product question arising
 - Security privileges edit
 - MDAC installation
 - Parameter edit
 - A request for product documentation
 - A product feature set related demonstration request (client already has the product)
 - Product reinstall
- A Support ticket can be both Internal or External in Nature
- A support ticket can be changed from Internal to External in nature.

Overview

TSG's Vision CRM is an on-line Customer Relationship Management product, which will dramatically improve our current support workflow. Vision CRM will provide numerous advantages over the current workflow, with most significant gain being the centralization, and easy analysis of your support issues.

VISION Workflow (External/Internal Task)



Helpdesk VISION

Visibility: Customer Support

Modules: Create Task, TSG VISION Tasks, Inbox, Personal VISION

Inbox [0/100] Filter Applied Click Create Task ?

ID: From: Product:

Unread All Messages Auto Refresh is disabled

ID	Subject	Action	Priority	From	...	Received Date
TSG-22598	Contact Us Page Changes		Normal	Muhammad Azeem-SSS	To	06/04/2009 12:53
TSG-24156	TSG Scheduler is taking a lot of memory		Normal	Syed Abbas-SSS	Cc	06/04/2009 10:10
TSG-24304	VISION minute changes		Normal	Muhammad Javed-SSS	To	06/04/2009 09:10
TSG-20621	PMO Goals 2009 ^^^Create a Project Priority Attribute^^^^2034		Normal	Jojo Thomas-SHS	To	06/03/2009 18:35
TSG-24258	Unable to upload to CRM		Normal	Cynthia Polite-TSG	Cc	06/03/2009 14:45
UTHCT-24118	Galactica viewer crashes		Normal	Mansoor Lakhani-TSG	Cc	06/02/2009 14:02
TSG-22598	Contact Us Page Changes		Normal	Muhammad Azeem-SSS	Cc	06/02/2009 12:28
TSG-24120	Request to add search filters in [Productivity VISION] report...		Normal	Salahuddin Khan-SSS	To	06/02/2009 09:07

My Inbox [0/100] Filter Applied Click Create Task ?

ID: From: Product:

Unread All Messages Auto Refresh is disabled

ID	Subject	Action	Priority	From	...	Received Date
TSG-22598	Contact Us Page Changes		Normal	Muhammad Azeem-SSS	To	06/04/2009 12:53
TSG-24156	TSG Scheduler is taking a lot of memory		Normal	Syed Abbas-SSS	Cc	06/04/2009 10:10
TSG-24304	VISION minute changes		Normal	Muhammad Javed-SSS	To	06/04/2009 09:10
TSG-20621	PMO Goals 2009 ^^^Create a Project Priority Attribute^^^^2034		Normal	Jojo Thomas-SHS	To	06/03/2009 18:35
TSG-24258	Unable to upload to CRM		Normal	Cynthia Polite-TSG	Cc	06/03/2009 14:45
UTHCT-24118	Galactica viewer crashes		Normal	Mansoor Lakhani-TSG	Cc	06/02/2009 14:02
TSG-22598	Contact Us Page Changes		Normal	Muhammad Azeem-SSS	Cc	06/02/2009 12:28
TSG-24120	Request to add search filters in [Productivity VISION] report...		Normal	Salahuddin Khan-SSS	To	06/02/2009 09:07

Task Details Click Create Task ?

TSG-21492 VISION_1.1.0^^^Draft End-User Documentation Creation^^^2126

Client: The Shams Group	Assign To: Laila Hajyani-TSG	Priority: Normal	CV: <input type="text"/>
Category: TSG Inhouse	Created By: Asif Allaiddin-SSS	Start Date: 04/13/2009 08:00	FV: <input type="text"/>
Product: VISION	Owner: aa-Project Management	Due Date: 05/29/2009 17:00	PV: <input type="text"/>

Description: Name Project : Vision 1.1.0 - Development Upgrade
 Project Plan: \\Isfile\projects\TheShamsGroup\2126.mpp
 PHP : http://tsgintranetp/HelpDeskP/Default.aspx?tabid=3267
 PMP : http://tsgintranetp/HelpDeskP/Default.aspx?tabid=3268

Contact Name	Phone	Email
No Client Contacts were found under selected Task/Ticket		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
V Added By	Added Date	Attachment Comments
No Attachments were found under selected Task/Ticket		

Task Communication (Last 2)

Asif Allaiddin-SSS 04/29/2009 08:47
Assign To : Laila Hajyani-TSG **Status :** Not Started **To :** Laila Hajyani-TSG **Not Started :** 2D 03h 09m

Hello Laila, Please proceed with the task, the details of which are listed below. Task: Draft

Hello Laila,



Please proceed with the task, the details of which are listed below.

Task: Draft End-User Documentation Creation
 Duration / Work : 34 Days / 8.5 Hours.


Upon completion, please mark the ticket as "Completed".

Modules: Create Task

This is the Task Creation form. Once Customer Support receives a call, they create a task using this form.

Form Fields	Description
Client	Select the Client
Category	Select the Product Category. If not selected, it gets auto-selected on product selection
Product	Select the Product that the client is complaining about. If the Product does not drop down please contact aa-IntranetSupport
Ref Type	If it is Server Crash, Meditech Down or Product Down. Priority for each gets auto selected
Ref Description	If Reference Type has been selected, provide a brief description of the Issue.
Task Date	: Refers to the Start Date of the Task. It is auto-fills with Today's Date
Due Date	Add a Due Date if any else this is calculated based on the Priority Rules
Subject	Add a Subject Line for the Issue
Description	Add Client's Issue Description for the Issue
Contact Details	Add multiple contacts for the Task. If the contact list does not dropdown the required contact, Select ***** New Contact *****, type contact Name, Phone and Email and click 
Attachment Details	Add Multiple Attachments with a brief description by browsing attachments and click 
Save Task	Click <input type="button" value="Save"/> to only save the task. Click <input type="button" value="Save & Communicate"/> to save task and redirect to the task communication page. Click <input type="button" value="Clear"/> to clear the Task Form

Modules: TSG VISION Tasks

As soon as client gets selected in the Create Task Form, this module shows all tasks for the selected client for reference. Once a Product Category gets selected, the tasks in this module get filtered by the selected client and the category and so on. Customer Support group can edit the Tickets in by clicking 

Modules: Personal VISION

Shows all tasks created by Customer Support. Customer Support group can edit the Tickets in this queue and any communication on these tasks goes to all members of Customer Support's VISION Inbox.

Modules: Inbox

Any communication on a particular task that has the user as a recipient comes to the user's VISION Inbox. Any Quick Message send to a user also comes into the VISION Inbox.

All communication on tasks created by Customer Support or assigned to a member of Customer Support goes to the VISION Inbox.

Personal VISON

Visibility: All Registered Users

Modules: Inbox, Shared Queue, My Task Queue, Task Details, Upcoming Task Queue, SiteServerInfo, SiteContactInfo, ProductInfo

Icons: Quick Message, Play, Idle, Hold, Complete/Close, Associate to a task, Add Recurrence, Task Communication

Inbox [3/3]

Mark as Read | Mark as Unread | Delete | ID: [] From: [] Product: [] [X]

Unread 0 All Messages

ID	Subject	Action	Priority	From	...	Received Date
TSG-29923	Please check IsDoor Application	[X]	Normal	Saad Satti-TSG	Cc	08/13/2009 10:22
TSG-29655	Support DashBoard Migration Issues	[X]	Normal	Sunil Mittal-SHS	To	08/13/2009 10:02
TSG-29923	Please check IsDoor Application	[X]	Normal	Laila Hajyani-TSG	To	08/13/2009 09:47

Shared Queue [32] [N: 32] [?]

ID: [] Product: [] Status: [] Task Type: [] AssignTo: [] [X]

T	ID	Subject	Priority	Actions	Status	Product	Create Date	QTime	A
S	TSG-29814	Synchronization of existing tasks	Normal	[P][U][D][X]	Not Started		08/12/2009 07:57	1D 03h	[U][M]
O	TSG-17777	* Support DashBoard Migration Issues	Normal	[P][U][D][X]	Not Started	SQL Support Dashboard	08/11/2009 10:25	2D 01h	[U][M]
D	TSG-18748	Develop forms "Schedule a Demo" and	Normal	[P][U][D][X]	Waiting on [U]	TSG Website	03/26/2009 05:33	2D 23h	[U][M]
O	TSG-25187	Letters requesting sites to upgrade	Normal	[P][U][D][X]	Waiting on [U]	SQL Upgrade	06/16/2009 15:06	2D 23h	[U][M]
O	TSG-29027	Issue with productivity report	Normal	[P][U][D][X]	Not Started	VISION	08/03/2009 16:36	9D 18h	[U][M]
D	TSG-8904	Rich Text Editor for Communication	Normal	[P][U][D][X]	Idle	VISION	09/26/2008 09:50	10D 03h	[U][M]
D	TSG-12895	Add Updatedby and UpdatedDate in al	Normal	[P][U][D][X]	Idle	Intranet	12/15/2008 09:23	13D 03h	[U][M]
D	TSG-4028	Reporting Structure View under Util	Normal	[P][U][D][X]	Idle	VISION	06/23/2008 10:41	14D 03h	[U][M]

My Tasks Queue [29] [N: 29] [?]

ID: [] Product: [] Status: [] Task Type: [] [X]

T	ID	Subject	Priority	Actions	Status	Product	Create Date	Due Date	QTime
D	TSG-26758	VISION_1.2.0^^^Draft End-User Docum	Normal	[P][U][D][X]	Working	VISION	07/07/2009 00:00	08/13/2009 23:59	02h
S	TSG-29923	Please check IsDoor Application	Normal	[P][U][D][X]	Completed	Server Management	08/13/2009 09:46	08/20/2009 23:59	01h 19m
O	TSG-14248	Team Meetings	Normal	[P][U][D][X]	Idle	Admin	01/13/2009 10:27	01/20/2009 23:59	21h 24m
D	TSG-15208	* All Category Routing	Normal	[P][U][D][X]	Idle	VISION	06/25/2009 09:02	05/27/2009 23:59	22h 27m
D	TSG-29792	TSG Calendar Events_3.3.0^^^Update	Normal	[P][U][D][X]	Not Started	TSG Calendar Events	08/12/2009 08:00	08/12/2009 17:00	1D 06h
O	TSG-12964	DNN Module Meetings and DNN Module	Normal	[P][U][D][X]	Idle	DNN Modules	12/16/2008 09:49	12/23/2008 23:59	2D 49m
D	TSG-23537	TSG Image Viewer_3.4.0^^^Ensure tha	Normal	[P][U][D][X]	Not Started	TSG Image Viewer	07/09/2009 00:00	08/11/2009 23:59	2D 08h

Task Details

TSG-29930 Keyfob System Issue

Client: The Shams Group
Category: Helpdesk
Product: Helpdesk

Assign To: Saad Satti-TSG
Created By: Sohail Hyderali Sattani-SSS
Owner: Sohail Hyderali Sattani-SSS

Priority: High
Start Date: 08/13/2009 10:10
Due Date: 08/16/2009 23:59

Status: Closed
Entry Type: Support (S)
Nature: Internal (CRM OTG)

CV: []
FV: []
PV: []

Description: All employees are appearing offline on intranet. Could you please check Key fob system.

Contact Name: Sohail Hyderali Sattani-SSS
Phone: []
Email: Sohail_Sattani@shamsgroup.com

Added By: []
Added Date: []
Attachment Comments: []

No Attachments were found under selected Task/Ticket

Task Communication

Saad Satti-TSG 08/13/2009 10:29
Assign To: Saad Satti-TSG **Status:** Waiting on Employee (Sohail Hyderali Sattani-SSS) **To:** Saad Satti-TSG, Laila Hajyani-TSG, aa-OTG **Cc:** Sohail Hyderali Sattani-SSS
Waiting on Employee: 02m

Sohail / Laila, Please check now and let me know if the issue is resolved or not. I restarted

Sohail / Laila,
Please check now and let me know if the issue is resolved or not.
I restarted the live monitor.
Thank You.
SAAD

SiteServerInfo

Server	Type	User Name	Pswd	CM Username	CM Pswd
TMTDictations	VNC	administrator	tsg1989	tmt2004	tmt2004
TMTDictations2	VNC	administrator	tsg1989	tmt2004	tmt2004
TMTETran	VNC	administrator	tsg1989	tmt2004	tmt2004
TMTETranTest	VNC	administrator	tsg1989	tmt2004	tmt2004
GalacticaRXOP	VNC	galacticarxop	galacticarxop	galacticarxop	galacticarxop
TMTHL7	VNC	tmtservices	otg2005	tmt2004	tmt2004
TMTHL7Test	VNC	tmtservices	otg2005	tmt2004	tmt2004

SiteContactInfo

Name	Capacity	Phone	Email
Adnan Masood		045-4578951	Adnan_Masood@shamsgroup.com
Aftab Shams-TSG		225	Aftab_Shams@shamsgroup.com
Ajay Donare-			Ajay_Donare@shamsgroup.com

ProductInfo

PHP PMP	Project#	ProjectName
PHP PMP	200650	Port to Port Communication 1.0.0
PHP PMP	200655	DNN Modules: Support Tasks
PHP PMP	200656	Admin Tasks
PHP PMP	200657	Emulation Support Tasks
PHP PMP	200657	ETranscriptor Support Tasks

Modules: Inbox









Any communication on a particular task that has the user as a recipient comes to the user's VISION Inbox. Any Quick Message send to a user also comes into the VISION Inbox. Click the column header to sort ascending or descending. Currently there are four features available in the VISION Inbox, Delete, Sort, Mark Read, and Mark Unread. Hover over the subject to see the task summary. Click the Subject to see communication along with task details in Task Details Modules.

Modules: Shared Queue

My Task Queue has all tasks that are assigned to an individual who is logged in. Hover over the subject to see the task summary. Click the Subject to see task details which only includes last two communications in Task Details Modules.

Modules: My Task Queue

My Task Queue has all tasks that are assigned to an individual who is logged in. Hover over the subject to see the task summary. Click the Subject to see task details which only includes last two communications in Task Details Modules. Following is the list of Actions that you can perform on a task

Icon	Action Name	Description
	Work/Play	Once a user gets ready to work on the task, he/she clicks this icon to start working on the task. This changes the task status from Not Started to Working. Any task in Working has a green back color
	Idle	Current workflow limits user from working on more then one master task and two sub-tasks. In case of switching task, the prior task should be put in Idle.
	Hold	Putting a task on Hold requires a Reminder Date and comments. On this date the task gets back into My Queue. Any task that is put on Hold moves from My Task Queue to Hold VISION (Tab next to Personal VISION)
	Complete	Click on this icon to complete a task. Completing a support type task requires a Actual Problem, Resolution and Resolution for Client
	Quick Message	Select a Recipient and send a message. The message will always get added to the Communication History. By Default the Assigned To and Creator of the task gets a copy of the message
	Edit Task	Click this icon to edit task details. Customer Support can only edit support Tasks. Only Product Category and Product we edited by the users.
	Communication/History	Click the icon to go
	Group	Hover over the icon to see the Group Name

Modules: Task Details

When the Subject is clicked in the VISION Inbox, Shares Queue and My Task Queue, task details that only includes last two communications or the Message appears in Task Details Modules.

Task Details

ALB-5179 Intranet Group Testing the Task without Product.

FutureVersion:	Product:	Client: Albemarle Hospital	Task Date: 05/16/2008 06:10	Due Date: 06/05/2008 23:59
Assign To: aa-IntranetSupport	Create By: Muhammad Javed-SSS	Status: Not Started	Ref Type:	Ref Desc:

Description: Description

Task Communication (Last 2)		Contact Name	Phone	Email
Cynthia Polite-TSG	05/16/2008 06:11	Candy Cooper	(252) 384-4761	ccooper@albemarlehosp.org

Status: Not Started **Priority:** Normal **Recipients:** aa-Helpdesk

Task has been created. Client "Albemarle Hospital", Product Category "", Product "", Task Date "05/16/2008 06:11" [X]

Added By **Added Date** **Attachment** **Comments**

No Attachments were found under selected Task/Ticket

Modules: SiteServerInfo

Once a task is selected by clicking on the Subject, this module displays selected Client's all Server Connections detail posted on System Implementation Intranet. If you do not see the required information, please contact aa-SystemImplementation.

Modules: SiteContactInfo

Once a task is selected by clicking on the Subject, this module displays all selected Client's Contacts posted on Product Management Intranet.

If you do not see the required information, please contact aa-IntranetSupport.

Helpdesk VISION: Create Task

Visibility: Customer Support Department

Modules: Create Task

Create Task

Task Details

Client:

Category: **Product:**

Ref Type: Server Crash Product Crash Meditech Job Issue
 Patient Critical

Ref Description:

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone : **Email:**

Name	Phone	Email

Attachment Details

Session is expired, please re-login.

Module: Create Task

Customer Support Department Users can create External (Support) Tasks using this module.

Create Task

Visibility: Role Based

Modules: Internal Task Entry

Internal Task Entry

Task Details

Client:	Select Client	Assign To:	aa-Accounting
Category:	Select Category	Product:	Select Product
Ref Type:	<input type="checkbox"/> Server Crash <input type="checkbox"/> Product Crash <input type="checkbox"/> Meditech Job Issue <input type="checkbox"/> Patient Critical	Current:	Select Current Version
Ref Description:		Future:	Select Future Version
Entry Type:	Select Entry Type	Patch Ver:	
Priority:	<input type="radio"/> Low <input checked="" type="radio"/> Normal <input type="radio"/> High <input type="radio"/> Severe		
Task Date:	06/16/2009 12:49	Due Date:	06/23/2009 23:59
Subject:			
Description:			

Contact Details

Contact:	***** New Contact *****	Name:	
Phone :		Email:	
Name	Phone	Email	

Attachment Details

<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="Upload"/>
<input type="text"/>		

Session is expired, please re-login.

Module: Internal Task Entry

Users can create Internal Tasks using this module.

Field: Product Category-Upgrades and Migrations

While creating a task user can choose from the following Upgrade/Migration

- MEDITECH OS Upgrade
- MEDITECH Upgrade
- MS OS Upgrade
- SQL Migration
- Hardware Migration

MEDITECH OS Upgrade: MEDITECH Operating System Upgrade

MEDITECH Upgrade: MEDITECH Application Upgrade, this includes an upgrade to any application, or a ring release to a suite of applications.

MS OS Upgrade: Microsoft operating system upgrade, typically involves a machine of server status. This includes, but is not limited to, the application servers (e.g. Galaxy and Galactica), integration servers (e.g. ASTRO) and internet information servers.

SQL Migration: Involves an upgrade of the Microsoft SQL software. This could include both an in-place or cross-server upgrade. (E.g. SQL 2000 to SQL 2005)

Hardware Migration: Involves moving both neutral software (non TSG software e.g. Microsoft software) and TSG centric software from one machine to another. This involves re-installation and reconfiguration of the software. Typically there is some downtime associated with this exercise.

Field: Reference Type

While creating a task user can choose from the following references

- Server Crash
- Product Crash
- MEDITECH Job Issue
- Patient Critical

Server Crash: If the server where the products are running has a problem, user can choose this option. Such tasks are automatically marked with a Severe Priority.

Product Crash: If the product in use crashes and does not work, user can choose this option. Such tasks are automatically marked with a Severe Priority.

MEDITECH Job Issue: If MEDITECH job has problems, user can choose this option. Such tasks are automatically marked with a Normal Priority.

Patient Critical: If any patient information is missing or incorrect, user can choose this option. Such tasks are automatically marked with a High Priority.

Field: Priority

While creating a task, a user can choose the Priority of the task. Only Assigned To and Owner can change Priority of a task

- Severe
- High
- Normal
- Low

Field: Entry Type

While creating a task, a user can choose the Entry Type of the task. Only Assigned To and Owner can change Entry Type of the task. Following are the Entry Types available for selection

10. Bug
11. Configuration
12. Custom
13. Enhancement
14. General Task
15. Project
16. QC
17. Recurring/Maintenance
18. Support

HR VISION

Visibility: Human Resource Department

Modules: HR Create Task

HR Create Task

Task Details

Client: **Assign To:**

Category: **Product:**

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone: **Email:**

Name	Phone	Email

Attachment Details

Session is expired, please re-login.

Module: HR Create Task

HR Users can create HR Internal Tasks using this module.

OTG VISION

Visibility: OTG Department

Modules: OTG Create Task

OTG Create Task

Task Details

Client: **Assign To:**

Category: **Product:**

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone: **Email:**

Name	Phone	Email
------	-------	-------

Attachment Details

Session is expired, please re-login.

Module: OTG Create Task

OTG Users can create OTG Internal Tasks using this module.

SI VISION (System Implementation VISION)

Visibility: System Implementation Department

Modules: SI Create Task

Create SI Task

Task Details

Client: **Assign To:**

Category: **Product:**

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone: **Email:**

Name	Phone	Email
------	-------	-------

Attachment Details

Module: SI Create Task

System Implementation Department Users can create Admin Internal Tasks using this module.

Admin VISION

Visibility: Administration Department

Modules: Admin Create Task

Admin Create Task

Task Details

Client: **Assign To:**

Category: **Product:**

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone : **Email:**

Name	Phone	Email
------	-------	-------

Attachment Details

Session is expired, please re-login.

Module: Admin Create Task

Administration Department Users can create Admin Internal Tasks using this module.

Accounting VISION

Visibility: Accounting Department

Modules: Accounting Create Task

Accounting Create Task

Task Details

Client: **Assign To:**

Category: **Product:**

Priority: Low Normal High Severe

Task Date: **Due Date:**

Subject:

Description:

Contact Details

Contact: **Name:**

Phone : **Email:**

Name	Phone	Email
------	-------	-------

Attachment Details

Session is expired, please re-login.

Module: Accounting Create Task

Accounting Department Users can create Accounting Internal Tasks using this module.

Support VISION

Visibility: Support Department

Modules: Application Support Create Task

Application Support Create Task

Task Details

Client: Select Client
Category: Select Category **Product:** Select Product

Ref Type: Server Crash Product Crash Meditech Job Issue
 Patient Critical

Ref Description:

Priority: Low Normal High Severe

Task Date: 06/16/2009 12:54 **Due Date:** 06/23/2009 23:59

Subject:

Description:

Contact Details

Contact: ***** New Contact ***** **Name:**

Phone: **Email:**

Name	Phone	Email
------	-------	-------

Attachment Details

Session is expired, please re-login.

Module: Application Support Create Task

Support Department Users can create External (Support) Tasks using this module. This is a copy of Helpdesk Create Task form.

PMO VISION

Visibility: PMO

Modules: PMO Create Task, PMO Auto Create Task, Project Tasks, PMO Sync Task Dates and Task Due Dates

Modules: PMP Create Task

▼ PMO Create Task

Task Details

Client:

Category:

Priority: Low Normal High Severe

Task Date:

Subject:

Description:

Assign To:

Project:

Due Date:

Contact Details

Contact: **Name:**

Phone: **Email:**

Name	Phone	Email

Attachment Details

Save
Save & Communicate
Clear

PMO can use the Create Task form to create any Project Type Task manually

Modules: PMO Auto Create Task



▼ PMO Auto Create Task

IDUmProject: →













URN : 2151 Project : EHR Auto Assignment 1.0.0 Project Status : Implementing Client : Fairmont General Hospital Category/Product : Galactica/EHR Auto Assignment 1.0.0

☐	Task Description	R	ID Task	Vision Status	Start Date	Finish Date	Resources	Duration	Wc
1	EHR Auto Assignment Implementation at FGH - URN 2151				05/07/2009 08:00	06/25/2009 17:00		50	42.
2	★ Planning Phase				05/08/2009 08:00	05/15/2009 17:00		8	1.
3	★ Create Project Infrastructure		FGH-22200	Closed	05/08/2009 08:00	05/08/2009 17:00	Laila Hajyani-TSG[13%]	1	1.1
4	★ Project Levelling		FGH-22201	Closed	05/15/2009 08:00	05/15/2009 17:00	Kashif Tanveer Siddiqui-SSS[3%]	1	.2
5	★ Project Audit		FGH-22202	Closed	05/15/2009 08:00	05/15/2009 17:00	Asif Allauddin-SSS[3%]	1	.2
6	★ Project Endorsement		FGH-22203	Closed	05/15/2009 08:00	05/15/2009 17:00	Kashif Tanveer Siddiqui-SSS[3%]	1	.2
7	★ Deploy & Configure E.H.R Auto Assignment				05/11/2009 08:00	06/25/2009 17:00		46	38.
8	★ Configure CPOE Report in External Image		FGH-22204	Closed	05/11/2009 08:00	05/14/2009 17:00	Pooja Raghunath-TSG[2%],Bindu A. Cherian-TSG[9%]	4	3.1
9	★ Fill out Parameter Sheet		FGH-22553	Closed	05/14/2009 08:00	05/14/2009 17:00	Nabeel Shahid-SSS[13%]	1	1.1
10	★ Review / Compile Application Manifest - Auto Assign		FGH-22554	Closed	05/14/2009 08:00	05/14/2009 17:00	Pooja Raghunath-TSG[3%]	1	.2
11	★ Deploy Auto Assign as per Manifest		FGH-22555	Closed	05/15/2009 08:00	05/15/2009 17:00	Azeem Rehman-SSS[50%]	1	4.1
12	★ Configure / Implement Auto Assign		FGH-22556	Closed	05/18/2009 08:00	05/22/2009 17:00	Pooja Raghunath-TSG[13%],Bindu A. Cherian-TSG[38%]	5	20.
13	★ Configure Auto Assign for One report		FGH-22855	Closed	05/22/2009 08:00	05/26/2009 17:00	Pooja Raghunath-TSG[0%],Bindu A. Cherian-TSG[1%]	5	.2
14	★ Configure e-Sign for One Report		FGH-22856	Idle	05/27/2009 08:00	06/17/2009 17:00	Rahim Khawaja-SSS[3%]	22	4.1
15	★ TechArt for Auto Assign and e-Sign		FGH-22857	Waiting on Prerequisite	06/18/2009 08:00	06/19/2009 17:00	Fahad Khan-SSS[31%],Nabeel Shahid-SSS[6%]	2	4.1
16	★ Perform ART - EHR Auto Assignment		FGH-22858	Waiting on	06/22/2009 08:00	06/25/2009 17:00	Siraj Hakkani-SSS[5%],Latisha Stanley-	4	2.1






Create Tasks

PMO can use auto task creation feature to generate tasks automatically from a project plan using this module. PMO must enter the URN of the Project and click  to get the steps in the Project Plan. PMO must select the tasks that he needs to create task for and click 

Modules: PMO Tasks

Project Tasks [4]											
Task ID :	<input type="text"/>	Ticket ID :	<input type="text"/>	IDUrnProject :	<input type="text" value="2151"/>	Project Status :	<input type="text"/>	Task Coordinator :	<input type="text"/>		
Due Date :	<input type="text"/>										
E	URN	ID	Subject	Priority	Action	Status	Product	Due Date	QTime	Ticket ID	Assig
	2151	FGH-22782	EHR Auto Assignment_1.0.0^^^Project Meetings- EHR ...	Normal	 	Not Started	EHR Auto Assignment	06/18/2009 23:59	32D 40m		Murtaza Moiz-TSG
	2151	FGH-22856	EHR Auto Assignment_1.0.0^^^Configure e-Sign for O ...	Normal	 	Idle	EHR Auto Assignment	06/17/2009 23:59	12D 08h		Rahim Khowaja-S
	2151	FGH-22857	EHR Auto Assignment_1.0.0^^^TechArt for Auto Assig ...	Normal	 	Waiting on Prerequisite	EHR Auto Assignment	06/18/2009 23:59	29D 07h		Nabeel Shahid-SS
	2151	FGH-22858	EHR Auto Assignment_1.0.0^^^Perform ART - EHR Aut ...	Normal	 	Waiting on Prerequisite	EHR Auto Assignment	06/24/2009 23:59	29D 07h		Latisha Stanley-T

- PMO can search for Project task with the following dimensions
- Task ID
- IdUrnProject
- Project Status
- Task Coordinator
- Due Date:

Interval  From :  To :   

This Week

Last Week



This Month

Last Month

Interval

Modules: PMO Sync Task Dates and Task Due Dates

PMO Sync Task Dates And Task Due Dates									
IDUrnProject :	<input type="text" value="2151"/>								
URN :	2151	Project :	EHR Auto Assignment 1.0.0	Project Status :	Implementing	Client :	Fairmont General Hospital	Category/Product :	Galactica/EHR Auto Assignment 1.0.0
<input type="checkbox"/>	ID Task	Subject	Assign To	Vision Status	Start Date	VISION Task Date	Finish Date	VISION Due Dat	
<input type="checkbox"/>	FGH-22856	EHR Auto Assignment_1.0.0^^^Configure e-Sign for One Report ^^^2151	Rahim Khowaja-SSS	Idle	05/27/2009	05/27/2009	06/17/2009	06/17/2009	
<input type="checkbox"/>	FGH-22857	EHR Auto Assignment_1.0.0^^^TechArt for Auto Assign and e-Sign ^^^2151	Nabeel Shahid-SSS	Waiting on Prerequisite	06/18/2009	06/17/2009	06/19/2009	06/18/2009	
<input type="checkbox"/>	FGH-22858	EHR Auto Assignment_1.0.0^^^Perform ART - EHR Auto Assignment^^^2151	Latisha Stanley-TSG	Waiting on Prerequisite	06/22/2009	06/19/2009	06/25/2009	06/24/2009	
<input type="checkbox"/>	FGH-22782	EHR Auto Assignment_1.0.0^^^Project Meetings- EHR Auto Assignment Implementation at FGH - URN 2151^^^2151	Murtaza Moiz-TSG	Not Started	05/07/2009	05/07/2009	06/18/2009	06/18/2009	

PMO can use this screen to Sync the VISION Task and Due Dates with Project Plan Start and End Dates. PMO must enter the URN of the Project and click  to view the Tasks. PMO can click on  to sync dates.

Communication Page

Visibility: All Registered Users

Modules: Task Actual Problem and Resolution Details, Task Details, Assign Subtask, Recipient Details, Recipient Menu, Attachment Details, Communication, Task Communication

Icons: Associate to the task, Recurrence, Edit Task

TSG-116885 Test for Intranet Support



Description: Test for Intranet Support

Client: The Shams Group
Category: **Assign To:** aa-VISIONSupport **Priority:** Normal **Status:** Not Started **CV:**
Product: **Created By:** Cinthia Polite-TSG **Start Date:** 03/13/2009 16:15 **Entry Type:** Support (S) **FV:**
Owner: Cinthia Polite-TSG **Due Date:** 03/20/2009 23:59 **Nature:** Internal (IntranetSupport) **PV:**

Contact Name	Phone	Email	ID	User	Status	Created	Wrk Hrs	Total Wrk
Laila Hajyani	214-233-2222	laila_hajyani@shamsgroup.com	ALB-384	aa-Accounting	Not Started	07/06/2009 08:53	0 secs	0 secs
Cinthia Polite-TSG	299	laila_hajyani@shamsgroup.com						

Task Actual Problem and Resolution Details

Assign To: aa-VISIONSupport **Status:** Not Started

Recipient: aa-Accounting **To** **Cc** **Bcc** [Attachments](#) [Assign Subtask](#)

To: aa-VISIONSupport [Assignee]
Cc:

Display Communication to Client Current Status [Update/Send](#) [Clear](#)

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/13/2009 11:35

(Display to Client) To: aa-VISIONSupport, Terry Cooper [terrycooper@abc.com], Laila Hajyani-TSG [laila_hajyani@shamsgroup.com] **Cc:** Cinthia Polite-TSG [laila_hajyani@shamsgroup.com]
 gffhh

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/12/2009 09:54

To: aa-VISIONSupport **Cc:** Siraj Lalani-SHS
 Test

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/12/2009 09:54

(Display to Client) To: aa-VISIONSupport, Laila Hajyani-TSG [Laila_Hajyani@shamsgroup.com], Laila Hajyani-TSG [laila_hajyani@shamsgroup.com] **Cc:** Cinthia Polite-TSG [laila_hajyani@shamsgroup.com]
 Test

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/12/2009 09:53

To: aa-VISIONSupport,
 Test

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/12/2009 09:52

To: aa-VISIONSupport
 test

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 08/12/2009 09:49

To: aa-VISIONSupport
 Test

Cinthia Polite-TSG [Reply](#) [Reply All](#) | 03/13/2009 16:16

Assign To: aa-VISIONSupport **Status:** Not Started **Priority:** Normal **To:** , aa-VISIONSupport

Task has been created. Client "The Shams Group". Product Category "", Product "", Task Date "03/13/2009 16:15". Due Date "03/20/2009 23:59". Priority

Task has been created. Client "The Shams Group". Product Category "", Product "", Task Date "03/13/2009 16:15". Due Date "03/20/2009 23:59". Priority "Normal". Task Description "Test for Intranet Support".

Modules: Task Actual Problem and Resolution Details

Task Actual Problem and Resolution Details

Actual Problem

Resolution (Upon Task Completion)

Resolution to Client

Actual Problem:

If the Client's Description of the Issue is the actual problem, please use the description as the Actual problem. The client can see the Actual Problem on VISION CRM.

Resolution:


How was the Issue resolved? This is for company knowledge base.

Resolution for Client:

This is the resolution that the Client would see on VISION CRM.

Modules: Task Details

Assign To: Muhammad Javed-SSS Status: Working

Assignee and task owner can change assignment and Status at all times. To edit other attributes, user can click  to edit the task

Modules: Sub Task Assignment

Create Subtask -- Webpage Dialog

ALB-116943 Test for Task Desc

Category/Product: Galactica/EHR

Assign To: Select Assign To

Priority: Low Normal High Severe

Subtask Date: 06/05/2009 09:47 (TaskDate: 06/05/2009 09:47)

Subtask Due Date: 06/12/2009 23:59 (Task DueDate: 06/12/2009 23:59)


Subject: Test for Task Desc

Description:

Attachment Details

Browse... Upload

Save Close




Assignee and Task Owner can request help from other groups by Subtask Assignment feature which lets them assign subtasks to multiple users/groups. Subtask will appear in the assignee's My Task Queue prefixed with  icon to the subject of the task. The subtask will have the following attributes.


- Subject
- Description
- Priority
- Start Date
- Due Date


Assignee can play the task, put it in idle/hold or can complete it. Master task cannot be completed unless all subtasks are completed. QC option will only be visible for Project Type Tasks. This option is added to identify QC type subtasks


Modules: Recipient Details



Select recipients and click    to add them to the list. By default recipient list will always have Assignee, Owner, Concerned Party and Technical Lead

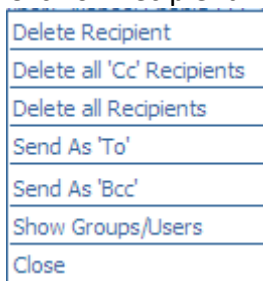
Click on  to add the Recipient to To list

Click on  to add the Recipient to CC list

Click on  to add the Recipient to BCC list

Modules: Recipient Menu

Click on Recipient Name to see the below menu



Delete Recipient:

Select to delete a recipient

Delete all 'Cc' Recipients:

Select to delete all Cc recipients

Delete all Recipients:

Select to delete all To, Bcc and Cc recipients

Send As 'To':

Move the recipient as 'To'

Send As 'Cc':

Move the recipient as 'Cc'

Send As 'Bcc':

Move the recipient as 'Bcc'

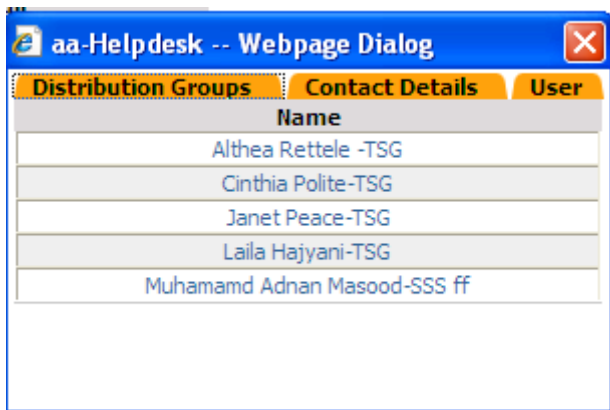
Show Groups/Users:

Select to view User or Group Details

Distribution Groups: Select **Distribution Groups** to view Groups if the recipient menu was for an individual. Select

Distribution Groups to view members of the group if the recipient menu was for a group

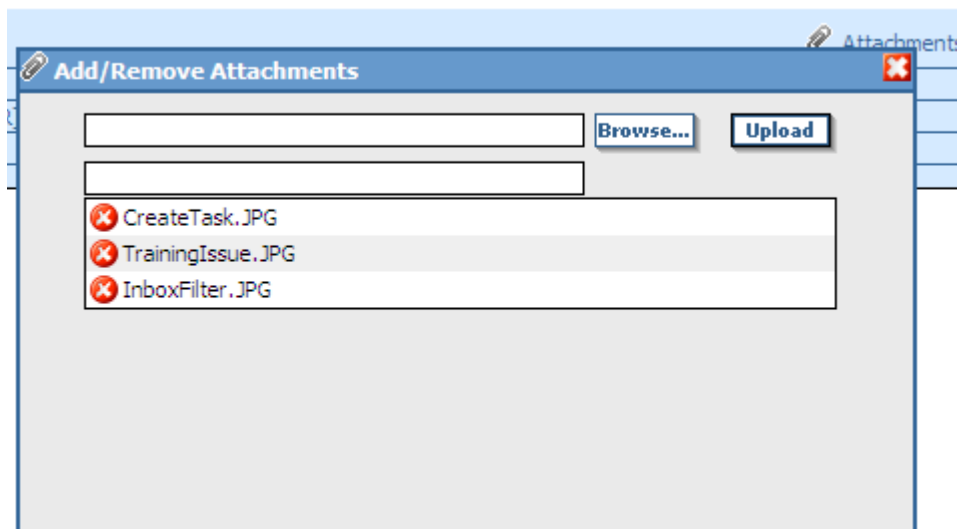
Contact Details: Select **Contact Details** to view individuals contact details




Close: Click to close menu

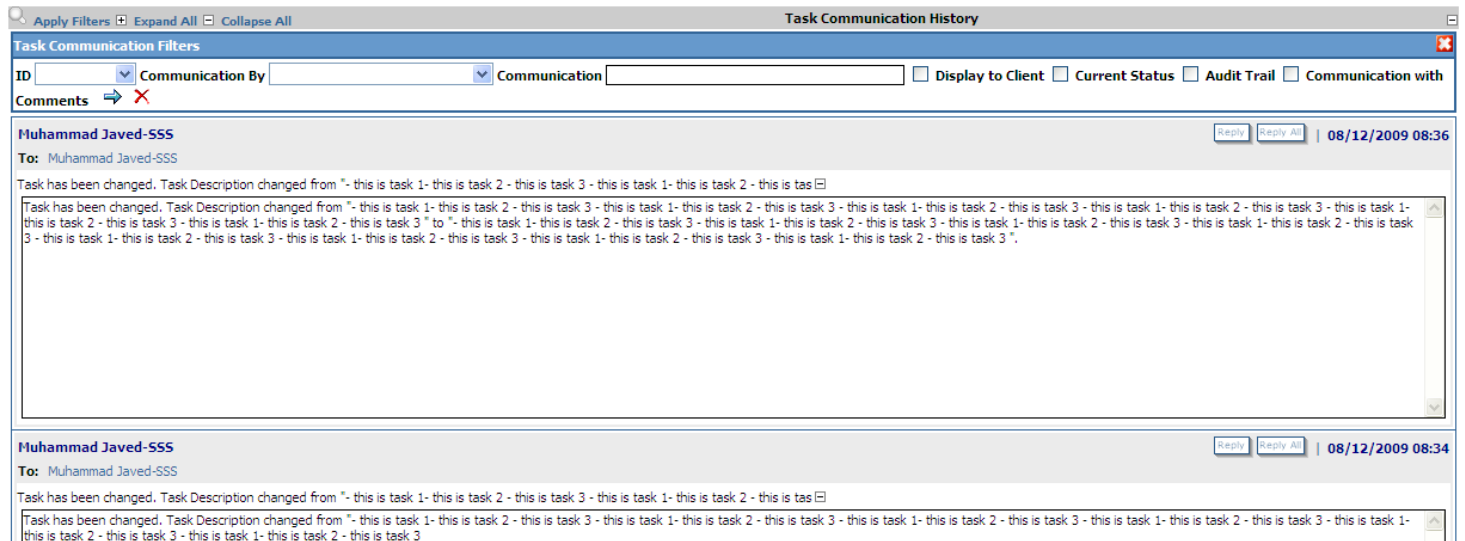
Modules: Attachment Details

Click **Attachments** to Add Attachments



Browse Attachments and add multiple attachments with description. Click **+** to add them to the list. Click **X** to remove them from the list.







You can filter the Task Communication History by clicking on filter icon 



The screenshot shows the 'Task Communication History' window. At the top, there are filter controls: 'Apply Filters' (with a plus icon), 'Expand All' (with a square icon), and 'Collapse All' (with a square icon). Below this is a 'Task Communication Filters' section with a search bar for 'ID', a dropdown for 'Communication By', and a text input for 'Communication'. To the right are checkboxes for 'Display to Client', 'Current Status', 'Audit Trail', and 'Communication with'. A 'Comments' link with a right arrow and a close icon is also present.

Two communication messages are shown. Each message header includes the sender's name 'Muhammad Javed-SSS', a 'To:' field with the same name, and a timestamp '08/12/2009 08:36' and '08/12/2009 08:34' respectively. The messages contain text indicating a task description change, such as 'Task has been changed. Task Description changed from "this is task 1- this is task 2 - this is task 3 - this is task 1- this is task 2 - this is tas'.

User can filter by the following fields

Fields	Type	Description
Communication By	List	Filter communication by individuals and click 
Communication	Keyword	Keyword Search within the communication and click 
Display to Client	Checkbox	Check the option and click  to show all communication that client would see
Show Audit Trail	Checkbox	Shows all actions and communications performed on the task
Current Status	Checkbox	Check the option and click  to see all communication marked as Current Status
Audit Trail	Checkbox	Check if you want to audit the task and click 
Comments Only	Checkbox	Check to view task history that has comments click 

Hold VISION

Visibility: Customer Support

Modules: Hold Task, Upcoming Task Queue, Task Details

T	ID	Subject	Priority	Actions	Product	Create Date	Reminder Date	Reminder	QTime	Assigned To
	TSG-116082	Test by Laila	Normal		Galactica POS	05/12/2008 12:05	08/31/2008 08:00	Hold	351D 05h	Muhammad Javed-SSS
	SALB-116904	test	Normal		Management Dashboard	03/31/2009 08:55	05/29/2009 08:00		77D 05h	aa-VISIONSupport

T	ID	Subject	Priority	Action	Status	Product	CreateDate	Due Date	QTime	Assigned To
D	TSG-14780	TSG Excel Export_3.1.1^^^Create Functional Specifi ...	Normal		Waiting on Prerequisite	TSG Excel Export	01/19/2009 08:00	01/19/2009 17:00	144D 11h	Laila Hajyani-TSG
O	TSG-21388	DNN Modules^^^Project Meetings - TSG Editor DNN Mo ...	Normal		Waiting on Prerequisite		06/09/2009 00:00	07/10/2009 23:59	48D 07h	Laila Hajyani-TSG
D	TSG-23537	TSG Image Viewer_3.4.0^^^Ensure that the Code is S ...	Normal		Waiting on Prerequisite	TSG Image Viewer	06/08/2009 08:00	06/08/2009 17:00	19D 12h	Laila Hajyani-TSG
D	TSG-23616	VISION Administration_1.0.0^^^Beta Version Demonstrat ...	Normal		Waiting on Prerequisite	VISION Administration	06/15/2009 00:00	06/15/2009 23:59	19D 09h	Laila Hajyani-TSG
I	GRHD-14715	Physician Portal_2.0.0^^^Create Project Intranet I ...	Normal		Waiting on Prerequisite	Physician Portal	06/26/2009 00:00	06/26/2009 23:59	19D 09h	Laila Hajyani-TSG

Task Details									
TSG-21388 DNN Modules^^^Project Meetings - TSG Editor DNN Module^^^2119									
Client:	The Shams Group		Assign To:	Laila Hajyani-TSG		Priority:	Normal		
Category:			Created By:	Asif Allaiddin-SSS		Start Date:	06/09/2009 00:00		
Product:			Owner:	aa-Project Management		Due Date:	07/10/2009 23:59		
Description:	PMP : http://tsgintranetp/HelpDeskP/Default.aspx?tabid=3265								
Task Communication (Last 2)									
Asif Allaiddin-SSS 06/12/2009 08:14 To: Laila Hajyani-TSG Task has been changed. Task Date changed from "06/16/2009 00:00" to "06/09/2009 00:00", Due Date cha ... Task has been changed. Task Date changed from "06/16/2009 00:00" to "06/09/2009 00:00", Due Date changed from "07/21/2009 23:59" to "07/10/2009 23:59".									

Modules: Hold VISION

Putting a task on Hold requires a Reminder Date and comments. On this date the task gets back into My Queue. Any task that is put on hold, moves to the Hold Queue and comes back to My Personal Queue on the reminder date.

Modules: Upcoming Task Queue

All Project tasks created are created 5 days prior to the start date. Upcoming task queue will have all Project tasks that have not started yet. Once PMO changes the status of the task from 'Pre-requisite Not Completed' to 'Not Started', tickets will move to My Task Queue.

Modules: Task Details


When the Subject is clicked in the Hold Queue, task details that only includes last two communications or the Message appears in Task Details Modules.

Completed VISION

Visibility: Customer Support/PMO



























































Modules: Completed Tasks, Task Details

Modules: Completed Tasks

Completed VISION shows all Completed Project and Support Tasks. Helpdesk and PMO can keep track of all Completed tasks and proceed with the Closure. After Tasks gets Closed, only Helpdesk can re-open Support Tasks and PMO can re-open the Project Tasks by clicking  and changing the status to Not Started.

Modules: Task Details

When the Subject is clicked in the Completed Queue, task details that only includes last two communications or the Message appears in Task Details Modules.

Helpdesk Completed/Closed Tasks [105]											
Date: <input type="text"/> Task ID: <input type="text"/> Subject: <input type="text"/> Priority: <input type="text"/> Product: <input type="text"/> Status: <input type="text"/>  											
T	R	ID	Subject	Priority	Action	Product	Create Date	Closed Date	Duration	Wrk Duration	A
S		SEMO-24702	Error when ordering Micro	Severe	 	Outreach Order Communication Portal	06/09/2009 13:53			02h 37m	
S		FGH-25049	Patient Bill interface is down	High	 	Interface Admin	06/15/2009 08:48			20m	
S		HFWC-24767	OE did not update again	High	 	Galaxy Warehouse	06/10/2009 07:51			02h 55m	
S		CAR-25078	Need STAT Report	High	 	WINTRAN INTERFACE	06/15/2009 12:35			13m	
S		CAR-25084	Reports Not Uploading to Meditech - Carondelet Hea ...	High	 	ETranscriptor	06/15/2009 12:52			01h 09m	
S		WRHS-24330	Cannot find document using Alt-F	High	 	WINTRAN INTERFACE	06/04/2009 13:42			02h 01m	
S		WRHS-24824	Unable to submit document	High	 	WINTRAN INTERFACE	06/10/2009 14:41			04m	
S		TRILHC-24825	Messages Need Replayed to TRM Interface.	Normal	 	HL7	06/10/2009 14:48			03h 26m	
S		BERG-24828	Need VMagic Batch File Patch	Normal	 	Galactica POS	06/10/2009 15:07			01h 06m	
S		UTHCT-24831	Deficiency Assignment	Normal	 	Coder Dashboard	06/10/2009 16:25			52m	
S		NEMC-24868	Convert User's Old GenR 97 .mdb to GenR 2000 .mdb	Normal	 	Galaxy GenR	06/11/2009 09:44			44m	
S		SMCW-24869	Test dictation	Normal	 	ETranscriptor	06/11/2009 10:16			33m	
S		MCDH-24889	error message	Normal	 	Galactica BO Batch	06/11/2009 12:50			01h 20m	
S		CAR-24899	Webportal Patient List Not Updating - ETranscripto ...	Normal	 	ETranscriptor	06/11/2009 15:36			42m	
S		GSMC-24902	reports not moving over to Meditech	Normal	 	WINTRAN INTERFACE	06/11/2009 16:48			02h 02m	



Task Details						
Client:	Assign To:	Priority:	Status:	CV:		
Category:	Created By:	Start Date:	Entry Type:	FV:		
Product:	Owner:	Due Date:	Nature:	PV:		
Description:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>					
No Task Detail Information found against selected client...						

Issue VISION

Visibility: CEOs, Directors, Managers, Team Leads

Modules: Completed Tasks, Task Details

Modules: Issue Queue

After Support Ticket gets created, if there is a missing Product or a Product category or auto-assignment did not work, the task goes into Issue Queue. A user can click  and edit the Product, Category or the assignment. User can add Quick Message by clicking 

Modules: Task Details

When the Subject is clicked in the Issue Queue, task details that only includes last two communications or the Message appears in Task Details Modules.

Task Details

ALB-5179 Intranet Group Testing the Task without Product.

FutureVersion: **Product:** **Client:** Albemarle Hospital **Task Date:** 05/16/2008 06:10 **Due Date:** 06/05/2008 23:59
Assign To: aa-IntranetSupport **Create By:** Muhammad Javed-SSS **Status:** Not Started **Ref Type:** **Ref Desc:**

Description: Description

Contact Name	Phone	Email
Candy Cooper	(252) 384-4761	ccooper@albemarlehosp.org

Task Communication (Last 2)

Added By	Added Date	Attachment	Comments
Cynthia Polite-TSG	05/16/2008 06:11		

Status: Not Started **Priority:** Normal **Recipients:** aa-Helpdesk

Task has been created. Client "Albemarle Hospital". Product Category "", Product "", Task Date "05/1"

No Attachments were found under selected Task/Ticket

Search VISION

Visibility: All Registered Users
Modules: Search Criteria, Task Details

Modules: Search Results

Search by any below criteria or combination search. You can Search deleted messages here as well. Most fields offer keyword search.

Field	Search Type	Description
ID	Keyword	Search by VISION ID. ID is a combination of <Site Mnemonic><Identity#>
Priority	List	Search by Priority of the Task
Status	List	Search by Status of the Task
Assign To	List	Search by Assigned Group and individuals
Client	List	Search by Client Name
Product	List	Search by Product
Outlook Tickets	Keyword	Search by Outlook ID
Owner	List	Search by Creator of the Ticket
Subject	Keyword	Keyword Search within a Subject
Comments	Keyword	Keyword Search within Communication
Current Version	Keyword	Keyword Search by Product Current Version of the Task
Future Version	Keyword	Keyword Search by Product Future Version of the Task
Patch Version	Keyword	Keyword Search by Product Patch version of the Task
Show Sub Task	Checkbox	Check if you are looking for both master and sub tasks/ Uncheck if you are not looking for sub tasks

Modules: Search Results
Shows Search Results

Utilities

Visibility: All Registered Users

Page: Users and Groups View

Modules: Users and Groups Filter, Users and Groups

Users and Groups Filter

Users and Groups: TSG ▼ Aftab Shams-TSG,Althea Rettele -TSG,Ananya ▼

Users and Groups

Name	List
Aftab Shams-TSG	aa-AnalysisCoderDashboard , aa-AnalysisCoderReports , aa-AnalysisEHR , aa-AnalysisEHRReports , aa-CoderReports , aa-EHRReports , aa-Team leaders-SSS , aa-TeamLeaders
Althea Rettele -TSG	aa-Administration , aa-Contract , aa-Helpdesk
Ananya Mohanty-TSG	aa-DI , aa-DM , aa-GalacticaSupport , aa-HL7 , aa-Integration , aa-MI , aa-SHS-SQLSupport , aa-SQL Support , aa-Support , aa-Tickets , aa-TMT-Support
Anis Ajani-TSG	aa-ClientServices , aa-Contract , aa-TeamLeaders
Anita Karim -TSG	aa-ClientServices , aa-Contract , aa-Sales , aa-Sales Support
Aysha Amlani-TSG	aa-Administration
Azeem Rehman-SSS	aa-SCM , aa-System Implementation

Modules: Users and Groups Filter

- Users can select the individuals to see which groups they belong to
- Users can select the groups to see the members of the selected group

Modules: Users and Groups

This module displays the result. All results are hyperlinked and when clicked would show the members if a group is clicked and groups if an individual's name is clicked

Utilities

Visibility: All Registered Users

Page: Productivity VISION

Modules: Productivity Summary, Productivity Analysis, Productivity TaskWorking Details

Modules: Productivity Summary

Productivity Summary

Client: Product: Entry Type: Nature:

Year: Duration: From: To:

[Expand All](#) [Collapse](#)

- Laila Hajyani-TSG
- Muhammad Javed-SSS
 - Kashif Ali Sabir-SSS
 - Muhammad Adnan Masood-SSS
 - Muhammad Azeem-SSS

05/12/2009 [Master Tasks : 11 Sub Tasks : 4 Work Duration : 31h 13m]			
Name	Master Task Count	Sub Task Count	Wrk. Hr.
Kashif Ali Sabir-SSS	4	0	6h 33m
Laila Hajyani-TSG	4	2	7h 40m
Muhammad Adnan Masood-SSS	2	0	8h 57m
Muhammad Azeem-SSS	1	2	8h 2m

05/13/2009 [Master Tasks : 11 Sub Tasks : 7 Work Duration : 27h 45m]			
Name	Master Task Count	Sub Task Count	Wrk. Hr.
Kashif Ali Sabir-SSS	2	0	7h 19m
Laila Hajyani-TSG	6	4	5h 6m
Muhammad Adnan Masood-SSS	1	0	7h 26m
Muhammad Azeem-SSS	2	3	7h 53m

05/14/2009 [Master Tasks : 10 Sub Tasks : 5 Work Duration : 30h 45m]			
Name	Master Task Count	Sub Task Count	Wrk. Hr.
Kashif Ali Sabir-SSS	2	0	7h 58m
Laila Hajyani-TSG	3	3	6h 8m
Muhammad Adnan Masood-SSS	3	1	9h 33m

Users can view the summary of tasks being worked on by them and their teams for a selected period. To review the productivity summary of the team, user must select the member by checking the checkbox near the member's name. Users can filter by

- Client
- Product
- Entry Type
- Nature
- Period
- Monthly
- Quarterly
- Yearly

Duration: From: To:

Duration: Jan - Jan

Duration: 1st - 1st

Year: Duration:

Modules: Productivity Analysis

To view further details of the Productivity Summary, click on either the individual's name or the date to see Productivity Analysis by Product in this module.

Productivity Analysis

Product and Task Type Summary | Tasks Summary Year: 2009 Date: 05/12/2009

Employee	Product	Task Type	Master Task Count	Sub Task Count	Worked
Kashif Ali Sabir-SSS		Support/Notification	1	0	22m
Kashif Ali Sabir-SSS	Intranet	Development	1	0	13m
Kashif Ali Sabir-SSS	VISION	Support/Notification	2	0	5h 57m

Modules: Productivity TaskWorking Details

To view further details of the Productivity Summary, click on either the individual's name or the date to see Productivity TaskWorking Details by tasks and sub tasks in this module

Productivity TaskWorking Details								
							Year : 2009	Date : 05/12/2009
T	ID	Employee	Subject	Product	Start Date	End Date	Worked	
S	TSG-21706	Kashif Ali Sabir-SSS	Pre Hire Setup List:Omeed Shams		Tue, 05/12/2009 04:56	Tue, 05/12/2009 05:18	22m	
S	TSG-22455	Kashif Ali Sabir-SSS	Provide permission to Vijaya S	VISION	Tue, 05/12/2009 05:18	Tue, 05/12/2009 06:18	59m	
S	TSG-2800	Kashif Ali Sabir-SSS	TSG VISION - Support issues an	VISION	Tue, 05/12/2009 06:18	Tue, 05/12/2009 09:35	3h 17m	
S	TSG-2800	Kashif Ali Sabir-SSS	TSG VISION - Support issues an	VISION	Tue, 05/12/2009 10:09	Tue, 05/12/2009 11:51	1h 41m	
D	TSG-19393	Kashif Ali Sabir-SSS	Create Employee Leave Entry Form	Intranet	Tue, 05/12/2009 11:51	Tue, 05/12/2009 12:04	13m	
	Sub Total		Master Task : 4 Sub Task : 0		Tue, 05/12/2009		6h 33m	

Utilities

Visibility: All Registered Users

Page: Client Contacts

Modules: Client Contact View

Modules: Client Contact View

This module shows client contacts and Projects for the selected client. You can group the client contact by Projects by clicking on Projects . Click on the client contacts name or Name Contact to view client contact details

Client Contact View										
Client: Fairmont General Hospital		Project:			Role:			Group By <input checked="" type="radio"/> Contacts <input type="radio"/> Projects		
Name Contact		Title	Phone	Cell #	Pager #	Email		Projects		
Alanna Wyant		Director, Cardiac Rehab Serv	(304) 367-7262			awyant@fghi.com		2		
URN	Name Project	Product	Status	Begin	End	PHP	PMP	PP	Role	
573	Galactica Registration	Galactica POS	Completed	04/20/2007	07/27/2007	PHP	PMP	PP	Director, Cardiac Rehab Serv	
574	Galactica Scheduling	Galactica POS	Completed	04/20/2007	07/27/2007	PHP	PMP	PP	Director, Cardiac Rehab Serv	
Becky Smith		Supervisor, Scheduling	(304) 367-7468			bsmith@fghi.com		2		
Brenda Cafazza		Director Infomation Services	304-367-7285			bcfafazza@fghi.com		10		
Carmella Walters		Director, Wound Care	(304) 363-4698			cwalters@fghi.com		2		
Carol Talkington		Director, HIM	304-367-7568			ctalkington@fghi.com		4		
Chad Williams		Director, Laboratory	(304) 367-7324			cwilliams@fghi.com		5		
Cheryl Maxwell		Director, Registration	(304) 367- 7196			cm Maxwell@fghi.com		2		
Janice Divan		Manager, Occupational Med	(304) 363-2018			jdivan@fghi.com		2		
Kathy Matheny		Director, HIM	(304) 367-7130			kmatheny@fghi.com		1		
Kelley Davis		Director, Pharmacy	(304) 367- 7144			kdavis@fghi.com		1		
Larry Stanley		Director, Radiology	(304) 367-7107			lstanley@fghi.com		2		
Linda Harker		IT Coordinator	(304) 367-7538			harli@fghi.com		4		
Lori Satterfield		Registration, Physical Therapy	(304) 363-3167			lsatterfield@fghi.com		2		
Luke Davis		Director, Physical Therapy	(304) 363-3167			ldavis@fghi.com		2		
Patrick Lykins		System Analyst II	(304) 367-7272	(304) 376-6541		PLykins@fghi.com		6		
Renaee Tennant		Registration, Wound Care	(304) 363-4698			rtennant@fghi.com		2		
Rickie Harper		Supervisor Sleep Lab, EEG, EMG Technician	304-367-7243			rharper@fghi.com		2		
Sarah Tennant		Pt Acct Coordinator	(304) 367-7534			stennant@fghi.com		1		
Stephanie Newbrough		Supervisor, HIM	(304) 367-7320			snewbrough@fghi.com		3		
Aaron Green		LAN Administrator I	(304) 367-7331			agreen@fghi.com		0		
Aftab Shams		CEO	(972) 9069397 X225			aftab@shamsgroup.com		0		
David Meyer		Clinical Pharmacy Manager	(304) 367-7236			dmeyer@FGHI.COM		0		
Dawn Metzgar		Marketing Coordinator	(304) 367-7543			DMetzgar@FGHI.COM		0		
Debbie Sailor		Nursing Information Coordinator	(304) 368-4562			dsailor@fghi.com		0		
Denise Satterfield		Scan Tech	(304) 367-7583			DSatterfield@fghi.com		0		
Diana Heaney		PC Support Analyst	(304) 367-7391			dheaney@fghi.com		0		
Francie Sherry		ANALYST	n/a			FSherry@fghi.com		0		

Dashboard

Visibility: CEOs, Directors, Managers, Team Leads

Modules: Dashboard, Filters, Expand and Collapse


Modules: Dashboard

Dashboard shows supervisors their team tickets. It follows the same hierarchy as published in the Organization chart and some custom hierarchy approved by Aftab.

President's Dashboard
Aftab Shams-TSG, President

Expand All Collapse All

Category	Summary	Details
UnAssigned Tickets [512]	Priority: L: 7 N: 175 H: 2 Type: O: 107 D: 23 I: 18 S: 36	Suma Krishnaprasad -TSG [184] Director Development, Integration, SQL Support, System Implementation
Severe [5]	Priority: S: 1 H: 4 N: 539 L: 22 Type: O: 263 D: 28 I: 82 S: 193	Bentley Cunningham-Scott -TSG [566] Director Customer Support, Product Management, Project Management
High [21]	Priority: N: 28 S: 1 L: 1 Type: O: 14 D: 4 S: 12	Sohaib Ali -TSG [30] Manager Development, SQL Support
Normal [1602]	Priority: S: 3 H: 10 N: 163 L: 3 Type: O: 135 D: 18 I: 6 S: 20	Muhammad Azfar Saeed -SSS [179] Manager Implementation 1, Implementation 2, Integration
Low [110]	Priority: N: 35 L: 1 Type: O: 18 D: 6 I: 4 S: 8	Dong Zhao -SSS [36] Manager Business Intelligence
Over Due Tasks [442]	Priority: N: 32 Type: O: 20 I: 11 S: 1	Sathyarayanan Palaniyappan -SSS [32] Team Leader System Implementation
All Tickets [1738]	Priority: L: 4 N: 83 S: 1 Type: O: 35 D: 16 I: 18 S: 19	Aftab Shams-TSG [N: 3 = 3] President O: 3
	Priority: L: 4 N: 83 S: 1 Type: O: 35 D: 16 I: 18 S: 19	Sohaib Ali -SSS [88] Manager Implementation 2
	Priority: H: 5 N: 76 L: 13 Type: O: 49 D: 13 I: 11 S: 21	Bentley Cunningham-Scott -SSS [94] Director, Project Management
	Priority: N: 62 Type: O: 45 D: 2 I: 8 S: 7	Muhammad Azfar Saeed -SHS [62] Manager Development, SQL Support, SQLI
	Priority: N: 48 Type: O: 29 D: 16 I: 2 S: 1	Suma Krishnaprasad -SHS [48] Director Development
	Priority: N: 53 Type: O: 36 D: 3 I: 10 S: 4	Sathyarayanan Palaniyappan -SHS [53] Team Lead System Implementation

Supervisors can see actual tasks for each employee for teams that directly reports to them. Supervisor can add Quick Message by clicking 

Laila Hajyani-TSG [L: 1 N: 131 H: 1 S: 1 = 134]
Product Manager TSG-Product Management
O: 118 D: 5 I: 5 S: 6

I	Patient Portal-	34D 20h 47m
D	Patient Portal 3.0.0^^^Release to A ...	4D 57m
S	Patient Portal - E-mail will not le ...	1D 11h 42m
S	Patient Portal-Correct Issues with ...	19D 08h 36m
	TSG Image Viewer- Include the new I ...	19D 18h 43m
I	TSG Intranet^^^Upgrade Intranet to ...	6D 17h 59m
S	e-Millennium-Sorting Error in show ...	45m
	Test during PMG Training	5D 04h 07m
I	TSG Intranet^^^Upgrade Intranet to ...	20h 40m
	Test by Laila	7D 20h 43m
		7D 20h

Supervisors can see task summary for the teams that fall under them. Supervisor can click the subordinate's name to see the team's actual tasks.

Priority: L: 12 N: 153 Type: O: 59 I: 5 S: 101

Cynthia Polite-TSG [165]

Team Leader Customer Support ,Project Management

Employee	L	N	H	S	Total
Cynthia Polite-TSG		10			10
Brenda Masiello-TSG	2	21			23
Janet Peace-TSG	8	75			83
Nadine Bain-TSG	1	19			20
Althea Rettele -TSG	1	28			29

Modules: Filters

Supervisors can click and apply a Global Filter to their Dashboard by selecting and **Save & Apply** the criteria. This criterion stays till the supervisor clicks and **Clear** the filter

Client : Select Client

Task Type : Select Task Tape

Priority : Select Priority

Branch : Select Branch

Save & Apply **Clear**

Modules: Expand and Collapse

Left Pane and Right Pane have **Expand All** **Collapse All** links. Clicking **Expand All** will maximize all the grids in the pane. Clicking **Collapse All** will minimize all grids in the pane.