

VISION 1.2.0 – Release Notes

Following enhancements/fixes are being applied during the downtime

- 'Assign To' column is being added to the Hold Queue in Hold VISION
- 'Assign To' Filter is being added to the Hold Queue in Hold VISION
- [Client Contact tab is being added where users can browse the client contact information and group information by Client, Project and Role](#)
- On popular demand we are adding auto-login feature in VISION. As soon as we apply this change, system will reset all internal users' password and an email will be send to each user with the new password. Please change the password as soon as possible.
- Currently all tasks of type SQL Migration, Server Migration and Meditech upgrade are auto-routed to aa-Helpdesk. Project Management Office will be the new owners of such tasks. After the upgrade all such tasks will be auto-routed to aa-Projectmanagement group.
- On Personal VISION Tasks that will be overdue tomorrow will be highlighted.
- INBOX Filter will be available at all times. Currently it is only visible if the user has more than 100 vision mails.
- [Let user associate him/her with a task. Once a user gets associated to a task, he/she will be CC on all communications for the associated task.](#)
- Making Entry Type Mandatory in Create Task Form.
- Addition of more filters in Productivity VISION Report under Utilities. Following filters are added
 1. Client,
 2. Product,
 3. Entry Type and
 4. Nature
- Filters applied, Sorting, checked items will retain on all queues on Personal VISION Page after Auto-Refresh
- [Addition of Subject, Description, Priority, Start Date, Due Date attributes to the Sub Task](#)
- [New look to the Task Communication Page](#)

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 **Assign To:** aa-VISIONSupport **Priority:** Normal **Status:** Not Started **CV:**
Category: **Created By:** Cinthia Polite-TSG **Start Date:** 03/13/2009 16:15 **Entry Type:** Support (S) **FV:**
Product: **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]
 gffhfh

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

Modules: Create Subtask

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 (Task Date: 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




Assignee, Task Owner and Task Originator 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 sub-tasks 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

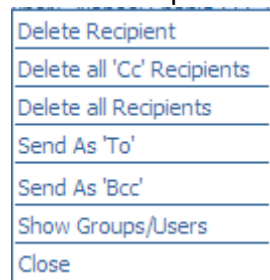
Click on  to add the Recipient to To list

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':

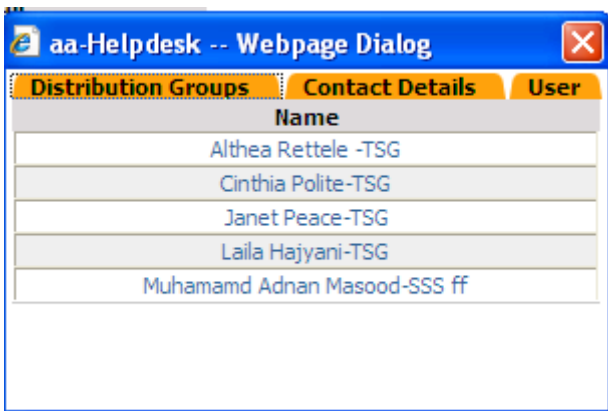
Move the recipient as 'Bcc'

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

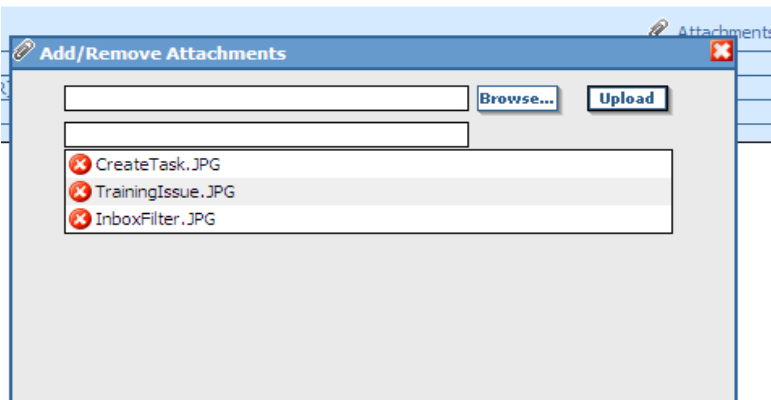
Contact Details: Select **Contact Details** to view individuals contact details

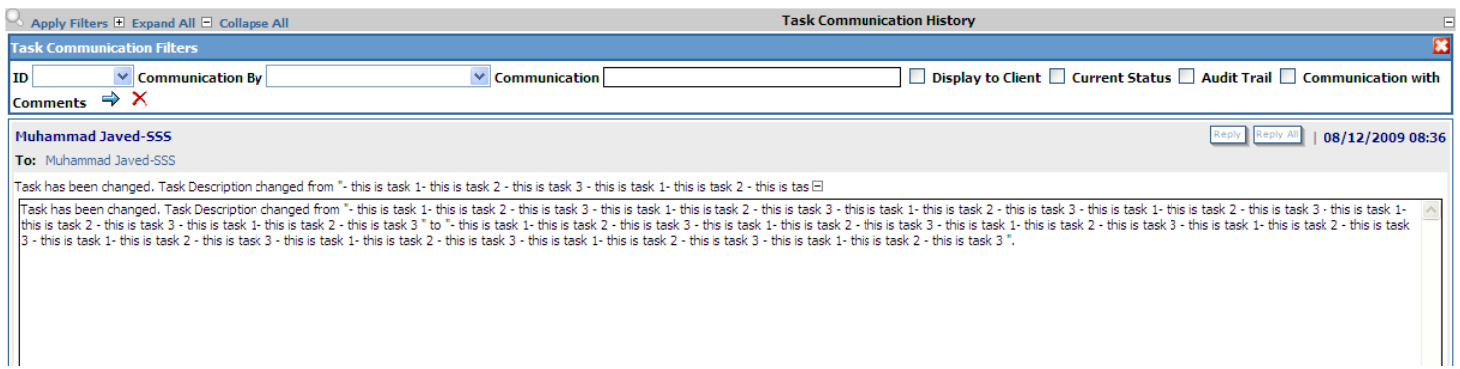


Close: Click to close menu

Modules: Attachment Details

Click **Attachments** to Add Attachments







User can filter the Task Communication History 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 ➡

Icon: Associate to the task

Any user can associate to a task by clicking on  icon. To De-Associate, click on  icon. Once a user associate himself to a task, all communication related to the task comes into user's inbox. Other users cannot see who is associated to a task.

Icon: Recurrence

Only the task originator can apply recurrence to a task by clicking

Icon: Edit Task

Only the task originator, task owner and assignee can apply edit the attributes of a task

Utilities – Client Contacts

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 selecting 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				
<input checked="" type="checkbox"/> Name Contact	Title	Phone	Cell #	Pager #	Email	Projects				
Alanna Wyant	Director, Cardiac Rehab Serv	(304) 367-7262			awyant@fghi.com	2				
JRN	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			bcafazza@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			cmaxwell@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				
Rena 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				

Communication Page - Sub Task


Visibility: Assignee, Task Originator and Task Owner

Page: Communication Page

Modules: Create Subtask

Modules: Create Subtask

The screenshot shows a 'Create Subtask -- Webpage Dialog' window. The title bar reads 'ALB-116943 Test for Task Desc'. Below the title bar, the 'Category/Product' is set to 'Galactica/EHR'. The 'Assign To' field has a dropdown menu and a 'Select Assign To' button. The 'Priority' section has four radio buttons: 'Low', 'Normal' (selected), 'High', and 'Severe'. The 'Subtask Date' is '06/05/2009 09:47' with a calendar icon and '(Task Date: 06/05/2009 09:47)'. The 'Subtask Due Date' is '06/12/2009 23:59' with a calendar icon and '(Task DueDate: 06/12/2009 23:59)'. The 'Subject' field contains 'Test for Task Desc'. Below the subject is a large text area for the 'Description'. At the bottom, there are 'Attachment Details' with two empty input fields, 'Browse...' and 'Upload' buttons, and 'Save' and 'Close' buttons at the very bottom.

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Communication Page – Associate to a task

Visibility: Assignee, Task Originator and Task Owner

Page: Communication Page

Icon: Associate to the task

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