PHI Process Test

# General Instructions

**This test should take around an hour to get through if you are familiar with PHI Process – please allocate a block of time within one day to do it rather than starting on one day and finishing another.**

**Unless otherwise specified, set yourself as the assignee and “PHIProcess Test Graders” as the controller when you create tasks.**

**Please be very diligent about getting the task and status report names correct – the automated grading system is looking for very specific names in order to assess if the correct actions were taken. If naming is wrong it is difficult to get a good grade.**

# Practical Section – Part 1

## Task Creation & Editing

1. Create a task called “PHIProcess Test 1”. Assign it to yourself with the due date of tomorrow and a soft deadline of today. Make “PHIProcess Test Graders” the controller of this task.
2. Create a task called “PHIProcess Test 2”. Make it due two weeks from Friday (or in two weeks if today is a Friday) with a soft deadline of the Monday prior to that due date. Make yourself the controller.
3. Create a task that recurs every Friday at 3pm called “PHIProcess Test 3”. Make yourself and “PHIProcess Test Graders” the controllers. Add it to your priority list.
4. Create a task that recurs the first business day of every quarter called “PHIProcess Test 4”. Assign it to yourself and the group “PHIProcess Test Graders”. Make it controlled by yourself and the group “PHIProcess Test Graders”. Put it in the “Recurring” section of your personal status report.
5. Set up an alert to yourself on “PHIProcess Test 2” that goes off every hour after the task is overdue. Add “PHIProcess Test Graders” as a controller.
6. A screenshot of a test

   Description automatically generatedCreate a task with the title and checklist as shown in Figure 1 to the right. Make yourself and “PHIProcess Test Graders” the controllers and assignees. The “More Info” link shown for “Step 2” should link to <http://www.google.com/>. Make it due tomorrow.

Figure 1: Checklist for Step 6

1. Make a copy of “PHIProcess Test 2” called “PHIProcess Test 6”. Under “Assignment #1”, click the link that says “Click here to open the next task instance” in the “Working on now” box.
2. Move the soft deadline of “PHIProcess Test 2” to next Tuesday.
3. From the Calendar tab, request to extend the deadline of “PHIProcess Test 1” by four days.
4. Add a checkbox to “PHIProcess Test 1”, called “Step 2”. Add the group “PHIProcess Test Graders” as an assignee. Make the task recurring, due daily (don’t forget you need to SAVE scheduling changes – press save in the scheduling area first before requesting a change using the button at the bottom). Send a change request for this change.
5. Create a subfolder of the “Status - <Your Name>” folder. Name it “PHIProcess Test Folder”. You may need to refresh to see the new folder.
6. Create a second subfolder under the “Status - <Your Name>” folder. Name it “PHIProcess Test Folder 2”. Again, you may need to refresh the page.
7. Place the task “PHIProcess Test 3” into “PHIProcess Test Folder”.
8. Move “PHIProcess Test Folder 2” inside “PHIProcess Test Folder”.
9. Place the task “PHIProcess Test 4” into “PHIProcess Test Folder 2”.
10. Delete “PHIProcess Test Folder 2”. Do not explicitly delete any task in this folder before doing so. You may need to refresh to see the change.
11. Make “PHIProcess Test 1” a template.

## Status Reports

1. Create a status report called “PHIProcess Test”. Navigate to that report (you may need to refresh to see it).
2. Create a section on the report called “Test Tasks”
3. Create a section on the report called “Tasks 1 through 6”
4. Add all the tasks you have created so far to “Tasks 1 through 6”
5. Create another section on the report called “Tasks 7+”
6. From the My Status tab, add a simple task called “PHIProcess Test 7” to “Tasks 7+”. Make “PHIProcess Test Graders” the controller.
7. Rename the “PHIProcess Test” status report, call it “PHIProcess Report”.
8. Rename “Tasks 7+”, call it “Everything Else”
9. Move the “Everything Else” section to the top of the report.
10. Delete the “Test Tasks” section.
11. Create a status report called “PHIProcess Report 2”
12. Create a section on “PHIProcess Report 2” called “All Tasks”.
13. Delete all other sections besides “All Tasks” on “PHIProcess Report 2”.
14. Copy all the tasks on “PHIProcess Report” into the “All Tasks” section on “PHIProcess Report 2”
15. Remove the task “PHIProcess Test 7” from “PHIProcess Report 2”
16. Create a report called “PHIProcess Report 3”
17. Create a task called “PHIProcess Test 8” in the first section on the PHIProcess Report 3 report. Make sure “PHIProcess Test Graders” is the controller.
18. Move the task “PHIProcess Test 8” to the “All Tasks” section on “PHIProcess Report 2”
19. Delete the report “PHIProcess Report 3”
20. Add the group “PHIProcess Test Graders” as a controller on “PHIProcess Report” and “PHIProcess Report 2”
21. Go to the report “PHIProcess Report”, make a comment on “PHIProcess Test 1”, “PHIProcess Test 3”, “PHIProcess Test 5”, and “PHIProcess Test 7”.
22. Send a Response Requested e-mail for the task “PHIProcess Test 3” to everyone on the list. If you only see yourself, refresh the page and try again.
23. Use the “Email Comments” feature to send your comments to everyone on the list.
24. Switch to the report “PHIProcess Report 2” and make a general comment.
25. Use the “Email Today’s Comments” feature to send your comments to everyone on the list.
26. Use the “Email All” feature to send the status report to everyone on the list.
27. Export both reports (PHIProcess Report and PHIProcess Report 2) to Excel format (note: Excel may warn “The file format and extension don’t match. The file could be corrupted or unsafe.” when opening the file. This is due to the method used to generate the file. It is safe to open).
28. From the My Status tab, request to add “PHIProcess Test Graders” as an assignee to the task “PHIProcess Test 1”

## Groups

1. From the Groups tab, create a group called “PHIProcess Test Group <your name>” where <your name> is your first name. (If a group with that exact name already exists, add your last name to the group name when creating your group)
2. Add yourself to this group.
3. On the “New Task” tab, create a complex task named “PHIProcess Test 9”. Assign it to the group you have created, controlled by “PHI Process Test Graders”.

## Priorities

1. Add all the tasks you have created so far to your priorities.
2. Sort the priorities into this order:
   1. PHIProcess Test 1
   2. PHIProcess Test 3
   3. PHIProcess Test 5
   4. PHIProcess Test 7
   5. PHIProcess Test 9
   6. PHIProcess Test 2
   7. PHIProcess Test 4
   8. PHIProcess Test 6
   9. PHIProcess Test 8
3. Update your comment on “PHIProcess Test 1” from your priorities list.
4. Email your priorities to yourself, making a general comment.
5. Mark “PHIProcess Test 9” as complete from the Priority List.

## Email Features

1. From your email client, find the “Today’s Priorities: <Your Name>” email sent previously. Using the “Reply” column of this email, create a reply to your comment on “PHIProcess Test 1”.
2. Create a task called “PHIProcess Test 10” via e-mail to [phipt@acmewidget.com](mailto:phipt@acmewidget.com) using all defaults.
3. Create another task called “PHIProcess Test 11” via e-mail. Set yourself as the controller.

\*\* *Note: the email automation may take a few minutes to create all tasks.* ***Please wait at this point*** *until you have received confirmation that the tasks have been created successfully, it should not take more than 15 minutes.*

1. Modify your e-mail preferences via the Preferences link in PHIProcess. Make it so tasks get added as the last item on your priorities.
2. Create a task called “PHIProcess Test 12” via e-mail using all defaults.
3. Create a task called “PHIProcess Test 13” via e-mail using all defaults.
4. Mark the task “PHIProcess Test 13” complete.
5. Re-open the task “PHIProcess Test 13”.
6. Create a task called “PHIProcess Test 14” assigned to yourself via e-mail to [phipas@acmewidget.com](mailto:phipas@acmewidget.com).
7. Mark the task “PHIProcess Test 14” as Closed – N/A.

# Views & Totals

For each step in this section, you will create a new task. Unless otherwise specified, use the following defaults for each task:

* Due on the first day of the month two months from today (Soft Due can be any date)
* Assigned to and controlled by yourself
* Do not add to your priority list or any status report

1. On the My Tasks tab, set the filter to all “Open” tasks one week in the past and three weeks in the future. Count all tasks you see in this view starting with “PHIProcess Test”, regardless of color-coding. Create a new task named “PHIProcess Total Tasks - X”, replacing “X” with the number you counted.
2. On the Calendar tab, set the active date to 4 days before today. Count all tasks that start with “PHIProcess Test” (Hint: you may wish to hide soft deadlines before counting). Create a new task named “PHIProcess Calendar Tasks - X”, replacing “X” with the number you counted.
3. On the Calendar tab, set the active date to today. Filter to “All Tasks I Control”. Count all tasks displayed that start with “PHIProcess Test”. Create a new task named “PHIProcess Controlled Tasks - X”, replacing “X” with the number you counted.
4. Count the number of tasks with comments displayed in the “All Tasks” section of the “PHIProcess Report 2” status report. Create a new task named “PHIProcess Report Tasks - X”, replacing “X” with the number you counted.
5. Count the number of tasks that have comments displayed in your Priority List. Create a new task named “PHIProcess Priority Tasks - X”, replacing “X” with the number you counted.
6. Run your History report with “Completed By” set to yourself, and all other fields set to the default criteria. Count all tasks you see in this view starting with “PHIProcess Test”. Create a new task named “PHIProcess History Tasks - X”, replacing “X” with the number you counted.
7. Count all pending requests under the “My Requests To Others” section of Change Requests. Create a new task named “PHIProcess Change Requests - X”, replacing “X” with the number you counted.
8. Count all tasks under the timeline view of the “PHIProcess Report” that have red due dates. Create a new task named “PHIProcess Timeline Tasks - X”, replacing “X” with the number you counted.
9. View all groups, and look for “PHIProcess Test Graders”. Create a new task named “PHIProcess Group - Username”, replacing “Username” with the one user listed who isn’t a real person (hint: their name will contain “PHIProcess”).
10. On the Search link, click “Toggle Help” until the green box is visible. Copy the text of the “Search Logic” section of the green box (not including the title “Search Logic” itself). Create a task named “PHIProcess Search - Text” replacing “Text” with the text you copied.
11. On the Help page, navigate to section 3.9.3 of “How To Use QProcess”. Copy the first sentence of that section (not including the title). Create a task named “PHIProcess Help - Text” replacing “Text” with the text you copied.

When you have completed all these steps, send an email addressed to Ken Croft ([kcroft@acmewidget.com](mailto:kcroft@acmewidget.com)), Keith Shannon ([kshannon@acmewidget.com](mailto:kshannon@acmewidget.com)) and Mitchell Hill ([mghill@phiairmedical.com](mailto:mghill@phiairmedical.com)) that you have completed your test.