PHIProcess Test

# General Instructions

**This test should take around an hour to get through if you are familiar with phiprocess – please allocate some time 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

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 next Friday with a soft deadline of next Monday. 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.
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 on 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. Create a task with all the steps like the screenshot below. Make yourself and “PHIProcess Test Graders” the controllers and assignees. Make it due tomorrow. A screenshot of a test

   Description automatically generated
7. 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.
8. Move the soft deadline of “PHIProcess Test 2” to next Tuesday.
9. From the Calendar tab, request to move the deadline of “PHIProcess Test 1” to next Wednesday.
10. 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.

## 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. Copy all the tasks on “PHIProcess Report” into the “All Tasks” section on “PHIProcess Report 2”
14. Remove the task “PHIProcess Test 7” from “PHIProcess Report 2”
15. Create a report called “PHIProcess Report 3”
16. 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.
17. Move the task “PHIProcess Test 8” to the “All Tasks” section on “PHIProcess Report 2”
18. Delete the report “PHIProcess Report 3”
19. Add the group “PHIProcess Test Graders” as a controller on “PHIProcess Report” and “PHIProcess Report 2”
20. Go to the report “PHIProcess Report”, make a comment on “PHIProcess Test 1”, “PHIProcess Test 3”, “PHIProcess Test 5”, and “PHIProcess Test 7”.
21. 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.
22. Use the “Email Comments” feature to send your comments to everyone on the list.
23. Switch to the report “PHIProcess Report 2” and make a general comment.
24. Use the “Email Today’s Comments” feature to send your comments to everyone on the list.
25. Use the “Email All” feature to send the status report to everyone on the list.
26. Export both reports (PHIProcess Report and PHIProcess Report 2) to Excel format (note, this exports to XLS and may warn you about that).
27. 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.
2. Add yourself to the group.

## 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 2
   6. PHIProcess Test 4
   7. PHIProcess Test 6
   8. PHIProcess Test 8
3. Update your comment on “PHIProcess Test 1” using the Status column on your Priorities tab.
4. Email your priorities to yourself, making a general comment.

## Email Features

1. Create a task called “PHIProcess Test 10” via e-mail to [phipt@acmewidget.com](mailto:phipt@acmewidget.com) using all defaults.
2. Create another task called “PHIProcess Test 11” via e-mail. Set yourself as the controller.
3. Modify your e-mail preferences via the Preferences link in PHIProcess. Make it so tasks get added as the last item on your priorities.
4. Create a task called “PHIProcess Test 12” via e-mail using all defaults.
5. Create a task called “PHIProcess Test 13” via e-mail using all defaults.

\*\*Note, the email automation may take a few minutes to create all tasks, please wait until completed, it should not take more than 15 minutes.

1. Mark the task “PHIProcess Test 13” complete.
2. Re-open the task “PHIProcess Test 13”.
3. Create a task called “PHIProcess Test 14” assigned to yourself via e-mail to [phipas@acmewidget.com](mailto:phipas@acmewidget.com).
4. Mark the task “PHIProcess Test 14” as Closed – N/A.

# Written Section

1. Create a new e-mail to [kcroft@acmewidget.com](mailto:kcroft@acmewidget.com) (in outlook or your typical email software, not through phiprocess). Use this email for the questions below. Please include the question number for each answer.
2. Paste a screenshot of your My Tasks tab showing only tasks due next week.
3. Paste a screenshot of the “PHIProcess Report” status report with small fonts.
4. Paste a screenshot of the “PHIProcess Report 2” status report with large fonts.
5. Paste a screenshot of your priorities with the comments showing.
6. Paste a screenshot of your History report.
7. Paste a screenshot of your Change Requests tab.
8. Paste a screenshot of the timeline view of “PHIProcess Report”.
9. Paste a screenshot of the View Groups pop-up showing the PHIProcess Test Group you created.
10. Paste a screenshot from the Search link
11. Paste a screenshot from the Help page of phiprocess – specifically the portion explaining what a template is in phiprocess
12. Send the e-mail you created at the beginning of this section.