ProcessPFS Test

# General Instructions

**This test should take around an hour to get through if you are familiar with ProcessPFS – 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 “ProcessPFS 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 “ProcessPFS Test 1”. Assign it to yourself with the due date of tomorrow and a soft deadline of today. Make “ProcessPFS Test Graders” the controller of this task.
2. Create a task called “ProcessPFS 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 “ProcessPFS Test 3”. Make yourself and “ProcessPFS Test Graders” the controllers. Add it to your priority list.
4. Create a task that recurs the first business day of every quarter called “ProcessPFS Test 4”. Assign it to yourself and the group “ProcessPFS Test Graders”. Make it controlled by yourself and the group “ProcessPFS Test Graders”. Put it in the “Recurring” section of your personal status report.
5. Set up an alert to yourself on “ProcessPFS Test 2” that goes off every hour after the task is overdue. Add “ProcessPFS Test Graders” as a controller.

Figure 1: Checklist for Step 6

A screenshot of a computer

Description automatically generated

1. Create a task with the title and checklist as shown in Figure 1 to the right. Make yourself and “ProcessPFS 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.
2. Make a copy of “ProcessPFS Test 2” called “ProcessPFS Test 6”. Under “Assignment #1”, click the link that says “Click here to open the next task instance” in the “Working on now” box.
3. Copy Assignment #1 of “ProcessPFS Test 6” to create a new assignment. In this new assignment, replace yourself with “ProcessPFS Test Graders” as the assignee. Keep the same due date and ensure there is an open task instance (click the link that says “Click here to open the next task instance” in the “Working on now” box, if it exists).
4. Move the soft deadline of “ProcessPFS Test 2” to next Tuesday.
5. From the Calendar tab, request to extend the deadline of “ProcessPFS Test 1” by four days.
6. Add a checkbox to “ProcessPFS Test 1”, called “Step 2”. Add the group “ProcessPFS 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.
7. Create a subfolder of the “Status - <Your Name>” folder. Name it “ProcessPFS Test Folder”. You may need to refresh to see the new folder.
   1. Note: If you do not see a folder with this name, you can create it using the “Add Folder” button, or by going to your personal status report and adding a new task.
8. Create a second subfolder under the “Status - <Your Name>” folder. Name it “ProcessPFS Test Folder 2”. Again, you may need to refresh the page.
9. Place the task “ProcessPFS Test 3” into “ProcessPFS Test Folder”.
10. Move “ProcessPFS Test Folder 2” inside “ProcessPFS Test Folder”.
11. Place the task “ProcessPFS Test 4” into “ProcessPFS Test Folder 2”.
12. Delete “ProcessPFS Test Folder 2”. Do not explicitly delete any task in this folder before doing so. You may need to refresh to see the change.
13. Make “ProcessPFS Test 1” a template.

## Status Reports

1. Create a status report called “ProcessPFS 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 “ProcessPFS Test 7” to “Tasks 7+”. Make “ProcessPFS Test Graders” the controller.
7. Rename the “ProcessPFS Test” status report, call it “ProcessPFS 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 “ProcessPFS Report 2”
12. Create a section on “ProcessPFS Report 2” called “All Tasks”.
13. Delete all other sections besides “All Tasks” on “ProcessPFS Report 2”.
14. Copy all the tasks on “ProcessPFS Report” into the “All Tasks” section on “ProcessPFS Report 2”
15. Remove the task “ProcessPFS Test 7” from “ProcessPFS Report 2”
16. Create a report called “ProcessPFS Report 3”
17. Create a task called “ProcessPFS Test 8” in the first section on the ProcessPFS Report 3 report. Make sure “ProcessPFS Test Graders” is the controller.
18. Move the task “ProcessPFS Test 8” to the “All Tasks” section on “ProcessPFS Report 2”
19. Delete the report “ProcessPFS Report 3”
20. Add the group “ProcessPFS Test Graders” as a controller on “ProcessPFS Report” and “ProcessPFS Report 2”
21. Go to the report “ProcessPFS Report”, make a comment on “ProcessPFS Test 1”, “ProcessPFS Test 3”, “ProcessPFS Test 5”, and “ProcessPFS Test 7”.
22. Send a Response Requested e-mail for the task “ProcessPFS 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 “ProcessPFS 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 (ProcessPFS Report and ProcessPFS 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 “ProcessPFS Test Graders” as an assignee to the task “ProcessPFS Test 1”

## Groups

1. From the Groups tab, create a group called “ProcessPFS 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 “ProcessPFS Test 9”. Assign it to the group you have created, controlled by “ProcessPFS Test Graders”.

## Priorities

1. Add all the tasks you have created so far to your priorities.
2. Sort the priorities into this order:
   1. ProcessPFS Test 1
   2. ProcessPFS Test 3
   3. ProcessPFS Test 5
   4. ProcessPFS Test 7
   5. ProcessPFS Test 9
   6. ProcessPFS Test 2
   7. ProcessPFS Test 4
   8. ProcessPFS Test 6
   9. ProcessPFS Test 8
3. Update your comment on “ProcessPFS Test 1” from your priorities list.
4. Email your priorities to yourself, making a general comment.
5. Mark “ProcessPFS 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 “ProcessPFS Test 1”.
2. Create a task called “ProcessPFS Test 10” via e-mail to [processpfs-tasks@phiairmedical.com](mailto:processpfs-tasks@phiairmedical.com) using all defaults.
3. Create another task called “ProcessPFS 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 ProcessPFS. Make it so tasks get added as the last item on your priorities.
2. Create a task called “ProcessPFS Test 12” via e-mail using all defaults.
3. Create a task called “ProcessPFS Test 13” via e-mail using all defaults.
4. Mark the task “ProcessPFS Test 13” complete.
5. Re-open the task “ProcessPFS Test 13”.
6. Create a task called “ProcessPFS Test 14” assigned to yourself via e-mail to [processpfs-assign@phiairmedical.com](mailto:processpfs-assign@phiairmedical.com).
7. Mark the task “ProcessPFS 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 “ProcessPFS Test”, regardless of color-coding. Create a new task named “ProcessPFS 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 “ProcessPFS Test” (Hint: you may wish to hide soft deadlines before counting). Create a new task named “ProcessPFS 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 “ProcessPFS Test”. Create a new task named “ProcessPFS 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 “ProcessPFS Report 2” status report. Create a new task named “ProcessPFS 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 “ProcessPFS 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 “ProcessPFS Test”. Create a new task named “ProcessPFS 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 “ProcessPFS Change Requests - X”, replacing “X” with the number you counted.
8. Count all tasks under the timeline view of the “ProcessPFS Report” that have red due dates. Create a new task named “ProcessPFS Timeline Tasks - X”, replacing “X” with the number you counted.
9. View all groups, and look for “ProcessPFS Test Graders”. Create a new task named “ProcessPFS Group - Username”, replacing “Username” with the one user listed who isn’t a real person (hint: their name will contain “ProcessPFS”).
10. Click the "Global Search" link at the top right of the screen. Search for a task in the search bar (ex: ProcessPFS Test 13). Note what color the highlighted returned search is. Create a task with the name “ProcessPFS Search-color" replacing “color with the highlight color. (ex: " ProcessPFS Search- yellow")
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 “ProcessPFS Help - Text” replacing “Text” with the text you copied.
12. At the bottom of the page select your time zone name next to the globe icon. In the dialog that appears, click the "Time Zone Converter link" in the upper right. Copy the first sentence of the instructions under "How to use this tool" and create a new task with that text as the task name.

When you have completed all these steps, send an email addressed to Mitchell Hill ([mghill@phiairmedical.com](mailto:mghill@phiairmedical.com)) and Oliver Govett ([ogovett@phiairmedical.com](mailto:ogovett@phiairmedical.com)) that you have completed your test.