Project Report: UI Tracker HMJ, LLC

Project Start Date: March 10, 2014 **End Date**: March 31, 2015

Completed Upcoming (next 7 days) Late

Milestones and associated tasks

		Milestone	Description	Due Date	Status	Days Late	Date Completed
		Build 1.25 Complete		12 Jan (2015)	Late	Due 28 days ago	

		Tasklists	Description	Start Date	Date Due	Priority	Progress	Status
	Build 1.25							
		OCR Import Report	After importing OCR data, a report is supposed to be generated of what the OCR read. This allows the user to compare what the OCR read vs what was on the original data vs what got into the system. This was never done properly.	09 Jan (2015)	15 Jan (2015)		100%	Completed 04 Feb (2015)
		Contact Data Not being imported	Please look again at the Sentinel Contact Data. It would appear that Contacts were not imported corrected.	26 Jan (2015)	27 Jan (2015)		100%	Completed 04 Feb (2015)
		Deploy 1.25 on staging	Deploy 1.25 on staging	09 Jan (2015)	09 Jan (2015)		90%	Started
		Impersonate Feature	Build an Impersonate Feature similar to TW that will allow a Super Admin to impersonate any User.	05 Jan (2015)	09 Jan (2015)		100%	Completed 09 Jan (2015)
		Quick Add Feature	When filling out a Claim, if a protest reason, or separation reason doesn't exist, the Client would like the ability to Quick Add one. Please estimate hours.	06 Jan (2015)	09 Jan (2015)		100%	Completed 09 Jan (2015)
		Change Log	Create an ongoing changelog that is submitted to git in a folder called Changelogs each month. Changelog is any change made to the build. It could be as simple as: Dec012014 v1.22 - bug fixes - performance optimization - sentinel data import etc, etc	09 Jan (2015)	09 Jan (2015)		90%	Started
		OCR Import Order	Currently the OCR import order doesn't match what we show on screen when OCR is complete. Some of this is due to exceptions, but to make it easy for the user to compare efficiently, please examine our options for this.	09 Jan (2015)	06 Feb (2015)		100%	Completed 04 Feb (2015)
		Show SSN on Request	Create a checkbox that allows the User to show/hide the full SSN. If it is disabled, it won't show in any downloaded Reports.	07 Jan (2015)	07 Jan (2015)		100%	Completed 08 Jan (2015)
		Hide Sub Org Units	Hide subordinate org units on request by User.	07 Jan (2015)	07 Jan (2015)		100%	Completed 08 Jan (2015)
		SSN Security	Be very specific on how we will be executing security surrounding sensitive data.	19 Jun (2014)	19 Dec (2014)		100%	Completed 26 Jan (2015)
		Matrix Verification	Please verify the following: reports didn't work, my previous email to Mike explains problems with individual reports charges didn't upload correctly we can't add negative charges when adding charges manually, not sure if they will upload because the upload didn't work the decimal is locked you have to type 200000 to get 200.00 when a adding manual charges noticed that charges were missing from some of the claims	17 Dec (2014)	17 Dec (2014)	medium	90%	Started

		Less Detailed Reports	For Reports - Region level of this Organization but don't show the breakout of the individual Branches. Or if Company only chosen, don't show Regions or Branches. Basically, it's like the Diggitt Custom TW Report. Allow the user to choose if they only want to see the information for the current level, or the current + all level belows (like it does now)	16 Jan (2015)	16 Jan (2015)		90%	Started
		Charges not working	Cannot manually enter credits (negative charge) on Claim screen. Verify it works on data center	08 Jan (2015)	09 Jan (2015)	high	100%	Completed 22 Jan (2015)
		Improved Search	Fix search to ignore dashes and such from social numbers so you can search for 123456789 and it will look for 12-345-6789	08 Jan (2015)	08 Jan (2015)	medium	100%	Completed 13 Jan (2015)
		Sticky Column Headers	Make the column headers sticky when scrolling on any Report.	15 Jan (2015)	15 Jan (2015)		100%	Completed 27 Jan (2015)
		OCR Credits and Charges	Matrix issue - As CLIENT ADMIN and EDITOR - OCR not getting pulled through for credits & charges on imported Claims - catholic residential november 2014	08 Jan (2015)	15 Jan (2015)	high	100%	Completed 22 Jan (2015)
		OCR Field Import	All fields are working for Workbox and others. Still not working for Matrix. Please check.	08 Jan (2015)	15 Jan (2015)	high	100%	Completed 22 Jan (2015)
		OCR Import Flags	Flags not working for Matrix.	08 Jan (2015)	15 Jan (2015)	high	100%	Completed 22 Jan (2015)
		Contact Roles	In addition to a Contact Name, please have a Contact Role dropdown. This would be populated in Admin>Dropdown Lists	09 Jan (2015)	09 Jan (2015)		100%	Completed 22 Jan (2015)
		Claims Alphabetization	Claim alphabetization - Not working on Client Admin and Editor	08 Jan (2015)	15 Jan (2015)	medium	100%	Completed 13 Jan (2015)
		Matrix Separation Reasons	Duplicate list of Separation Reason to Reason on Claim for Matrix only	08 Jan (2015)	08 Jan (2015)		100%	Completed 13 Jan (2015)
		Logos on Reports	Please have Organization Logos appear at the top of reports.	08 Jan (2015)	10 Jan (2015)		100%	Completed 22 Jan (2015)
		Deploy and test 1.24 in staging	Deploy and test 1.24 in staging	19 Jan (2015)	19 Jan (2015)		100%	Completed 19 Jan (2015)
		Matrix Response Due	When we take Matrix live (at some point), can we eliminate the claims in the "Response Due" tab on the home page? There were different date requirements in Sentinel and every claim in the system will show up on this tab, but they do not care about those claims and the response due. All claims entered going forward should be subject to the normal response requirement.	27 Jan (2015)	06 Feb (2015)		100%	Completed 04 Feb (2015)
		• Take a look at the demo database and the hearings and responses tabs	Also, take a look at the demo database and the hearings and responses tabs. See what you find wrong with it, but I see both the hearings and responses lists duplicated on each (both of them show up in each tab).	04 Feb (2015)	05 Feb (2015)		100%	Completed 04 Feb (2015)
		Contact Details	Build out a mechanism so when in an Organization, a User can easily see all entered data for a Contact. Maybe a little info icon or some such like the attached file.	02 Feb (2015)	06 Feb (2015)		100%	Completed 04 Feb (2015)
		Search Org Path	When displaying Advanced Search Results on the Claims page we currently show a column called Organization. We have been requested by the Client that the entire organizational path should be visible (Region, Branch). We think the easiest way to accommodate this is via a tooltip on the Organization name. This will show vertically the entire path of the Claim.	02 Feb (2015)	06 Feb (2015)	low	100%	Completed 04 Feb (2015)
		QA	Please test this build on Staging	09 Jan	09 Jan			Not

		QA	Please test this build on Staging.	(2015)	(2015)			Started
		OCR Issues	These charge docs for Michigan would not import. Kept saying form not recognized. This needs to be corrected. Should not be throwing this erreor on these forms.	15 Jan (2015)	15 Jan (2015)	medium	90%	Started
		Response Due Issue	This claim shows up inder responses due tab on home page but there is a date entered in the response sent field on claim.	15 Jan (2015)	15 Jan (2015)		90%	Started
		Catholic School Import - Staging	From the Client: I cannot get the Catholic Residential file to import into the system - the "Accept" button is not able to be clicked - is this because it was imported once already? How can we test it again or do they need to choose a different file to try?	08 Feb (2015)	08 Feb (2015)	high	90%	Started