Project Report: <u>UI Tracker</u> HMJ, LLC

Project Start Date: March 10, 2014 **End Date**: March 5, 2015

ONE **MOTION** technologies

🟩 Completed 🟧 Upcoming (next 7 days) 🟥 Late

Milestones and associated tasks

Total Hours: 2286 hrs 22 mins   **Total Estimated Time:** 423 hrs   **Total Billable Time:** 1002 hrs 30 mins   **Total NonBillable Time:** 1283 hrs 52 mins

		Milestone	Description	Due Date	Responsible	Status	Days Late	Date Completed
🟧		**Build 1.26 Complete**		19 Feb (2015)	Marcus D.	Upcoming		

			Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
			Build 1.26										
	🟥		Contact Details	Build out a mechanism so when in an Organization, a User can easily all entered data for a Contact. Maybe a little info icon or some such.	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	4 hrs	None	None
	🟥		SUTA Attachments	SUTA Tables - Identify what it is attached to. Like what regions or branches are attached to that UI Account Number.	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	1 hr	None	None
	🟥		SUTA Formatting	SUTA Tables - Show MORE - Is the table losing row formatting? If so, please correct.	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	1 hr	None	None
	🟥		SUTA Duplicates	SUTA Tables - Eliminate duplicates	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	1 hr	None	None
	🟥		Decimals	Explore Employer Decimals. On Save, if no decimals entered add .00 If decimals entered, like .67, do not add decimals as the user already did	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	2 hrs	None	None
	🟥		Auto Save	Look into-auto saving, greying out buttons where you don't need to save if data isn't changed	02 Feb (2015)	05 Feb (2015)	Precy M.			Not Started	4 hrs	None	None
	🟥		Tertiary Contact	Change Tertiary Contact to Alt. Contact, like the other Alt. Contact with the same look and functionality.	09 Jan (2015)	10 Jan (2015)	Precy M.			Not Started	15 mins	None	15 mins
	🟥		Search Org Path	When displaying 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)	05 Mar (2015)	Precy M.			Not Started	1 hr	None	None
											14 hrs 15 mins	None	15 mins
											Over/Under	14 hrs	

		Milestone	Description	Due Date	Responsible	Status	Days Late	Date Completed
🟧		**Build 1.25 Complete**		19 Feb (2015)	Marcus D.	Upcoming		

		Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable

Build 1.25											
	Better Multi Selection	Client not happy with current methodology for selecting multiple items like organizations. Let's explore other ideas.	04 Jan (2015)	04 Jan (2015)	Precy M.			Not Started	3 hrs	None	None
	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	01 Jan (2015)	31 Jan (2015)	Precy M.		20%	Started	15 mins	None	None
	Expanding Documents Functionality	Providing the ability to keep track of the document folders (global docs) more effectively. The whole adding info to the filename thing does not work and as you can see from the production database, sorting through a larger number of documents is problematic at best (as I predicted). Marcus and I discussed a fix (by client and by document folder). I believe this needs to happen to make the software more effective (for Matrix especially).	04 Jan (2015)	04 Jan (2015)	Precy M.			Not Started	None	None	None
	SSN Security	Be very specific on how we will be executing security surrounding sensitive data.	19 Jun (2014)	19 Dec (2014)	Marcus D.		60%	Started	1 hr	None	6 hrs
	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	07 Jan (2015)	07 Jan (2015)	Precy M.	medium	70%	Started	None	None	None
	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)	09 Jan (2015)	15 Jan (2015)	Precy M.		30%	Started	2 hrs	None	8 hrs
	Sticky Column Headers	Make the column headers sticky when scrolling on any Report.	15 Jan (2015)	15 Jan (2015)	Precy M.		90%	Started	1 hr	None	1 hr
	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)	Precy M.		60%	Started	3 hrs	None	None
		When we take Matrix live (at some point), can									

		Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
		Matrix Response Due	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)	27 Jan (2015)	Precy M.			Not Started	30 mins	None	None
		Contact Data Not being imported	None of the contact info has come over into UI Tracker from Sentinel	26 Jan (2015)	27 Jan (2015)	Precy M.			Not Started	2 hrs	None	None
										59 hrs 45 mins	**7 hrs**	**44 hrs 2 mins**
										Over/Under	**8 hrs 43 mins**	

		Build 1.24 Complete			19 Dec (2014)	Marcus D.		Late		Due 38 days ago		

		Tasklists	Description	Start Date	Date Due	Assigned To	Priority	Progress	Status	Estimated	Time	Billable
		Build 1.24										
		Missing Data	184-78-5928 SSN on Staging. Look at Claims and Charges. Not all info is showing though Client says it is 100% in Sentinel data. Please verify. Employer Potential Liability is one example.	11 Dec (2014)	11 Dec (2014)	Precy M.		90%	Started	2 hrs	None	8 hrs 30 mins
		Charges/Credits Report	This report is like the regular charge report, but only showing those charges and credits that were imported from a document or csv file (with a total at the bottom to compare to the imported document).	15 Dec (2014)	17 Dec (2014)	Precy M.	high		Not Started	4 hrs	None	3 hrs 30 mins
		Company Logos on Letters	Please provide a level of effort quote in regards to putting Organization logos onto Letters.	15 Dec (2014)	15 Dec (2014)	Precy M.	medium	40%	Started	None	None	5 hrs 30 mins
		Code Commits to SVN	Josh has noticed that nothing has been committed to SVN in months. Please report why this is and make sure we're doing code commits.	27 Jan (2015)	27 Jan (2015)	Precy M.	medium		Not Started	None	None	None
										36 hrs	**None**	**86 hrs 37 mins**
										Over/Under	**50 hrs 37 mins**	