Support

PowerHealth Solutions
Driving hospital efficiency

PowerAssist User Guide

PowerHealth Solutions: ABN 65 069 679 152
www.powerhealthsolutions.com

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Overview

Introduction

Purpose

PowerAssist is an Internet system for logging support calls relating to PowerHealth Solutions software problems, queries or enhancements. It facilitates communication between all interested parties and PHS support personnel. Additionally PowerAssist allows all users and stakeholders to track the progress of each logged task from initial contact through to resolutions.
PowerAssist is available to all clients 24-hours a day, 7 days week, requiring only an Internet connection and a web-browser. Clients are encouraged to use PowerAssist for logging support tasks, as the system officially documents all support tasks to allow a timely resolution or escalation as required.
PowerAssist is recommended to be used with Microsoft Internet Explorer. This web-browser ensures all functions of PowerAssist work as expected.

Functions

PowerAssist users are able to:

- Log support calls with supporting documentation, including detailed comments and attachments of screenshots
- Monitor the progress of each logged support task through the stages of
  1. assigned to a PHS Support Personnel
  2. provided with a resolution by PHS Consultant or Developer
  3. reassigned to the client for testing of the resolution provided
- Test the resolution and take the following actions
  1. Client accepts resolution as satisfactory and changes the status to *Closed*
  2. Client does not accept resolutions as satisfactory and reassigns task to PHS Support for further investigation leaving the status as *Open*
- Monitor the progress of a support task through to its Closure.

Note: Site Managers can also monitor all the support calls logged by registered members of their team.

Administrator

The PowerAssist Administrator is responsible for all user access.
If you have any problems accessing PowerAssist, please contact:

- Administrator: ***PHS Support***
- Phone: +61 8 8410 6404
- E-mail: powerassist@powerhealthsolutions.com

Things to check before you log a support task:

Check the PHS knowledge base

Before reporting an issue, consult the following documentation for known solutions:

Known Issues - system issues that have a workaround or are already addressed in a future version release
Frequently Asked Questions - questions regarding system setup, data setup or product information
Latest Documentation - useful product documentation including:

- application documentation (eg extraction template definitions, data import specifications)
- technical documentation (client install guides, hardware & software requirements, install test plans, administrative guides)
- release notes

Please refer to the procedure section of this user manual to locate detailed instructions specifying how to access PHS Customer Support documentation.

Note: PHS reserves the right to publish and share any PowerAssist issues that may be helpful to other clients, either under Known Issues or Frequently Asked Questions.

Responsibilities

PHS responsibility

- PHS will acknowledge the receipt of the call, and reserve the right to adjust the priority to meet our Service Level Agreement specification. If you disagree with the status or priority of a PowerAssist call, please log a comment in the task
- PHS commits 10% of license fees towards meeting requested enhancements, including those logged through PowerAssist
- Each year, a list of all outstanding enhancements (along with an estimate of the resources required to complete each task) is sent to PHS Clients, who then prioritise the enhancements through a voting process
- Regular User Conferences are conducted by PHS to establish future product enhancements

Logged Status	No Client response after number working days	Downgraded to status of
Critical	3	High
High	7	Medium
Medium	10	Low
Low	20	Closed

Client responsibility

The PHS client responsibilities involve:

- PowerAssist to be used to log any problems that are being experienced with PowerHealth Solutions software. Issues include:
    - software problems
    - enhancements
    - requests for assistance, eg software upgrades
    - general user queries

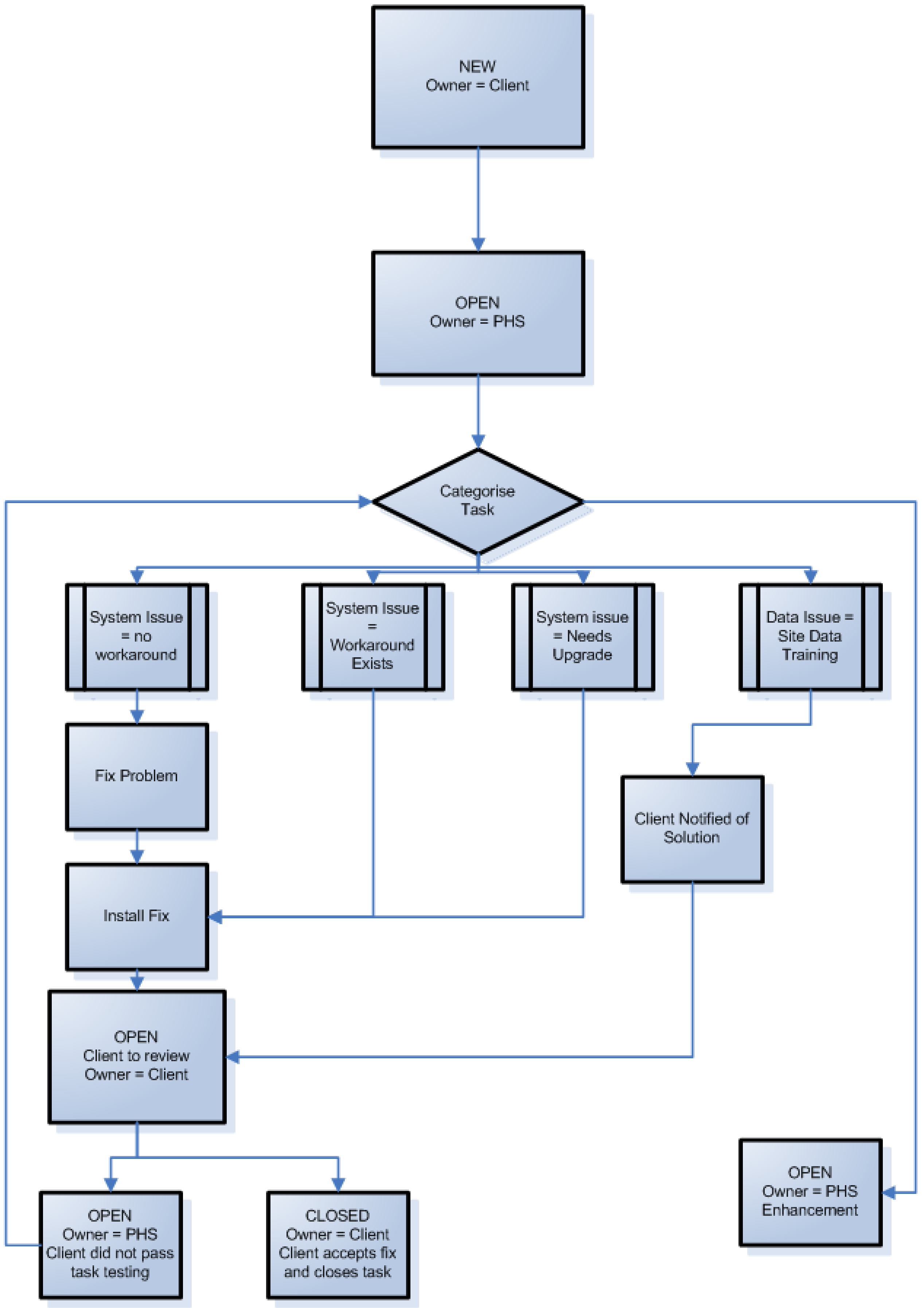
NOTE: Please do not use PowerAssist for questions on product sales, professional services or training

- Supplying further information on request
- PHS will respond to all PowerAssist calls logged according the metrics outlined in the agreement between PHS and the client organisation
- Testing provided resolutions of logged tasks subsequent to PHS Support Personnel releasing the relevant software upgrade or notified the task user of the resolution to the logged issue. This ensures client satisfaction with resolutions of logged tasks prior to closure.
- Close tasks that have satisfactorily passed Client Testing
- Where a task is waiting upon client response and/or action for a specified number of days PHS reserves the right to automatically downgrade the task in order to maintain an orderly flow of information and prioritisation within the PowerAssist system

PowerAssist process

Diagram

The following diagram outlines the process of a support call, from initial contact through to resolution:


NEW
Owner = Client
OPEN
Owner = PHS
Categorise Task
System Issue = no workaround
System Issue = Workaround Exists
System issue = Needs Upgrade
Data Issue = Site Data Training
Fix Problem
Client Notified of Solution
Install Fix
OPEN
Client to review
Owner = Client
OPEN
Owner = PHS
Client did not pass task testing
CLOSED
Owner = Client
Client accepts fix and closes task
OPEN
Owner = PHS
Enhancement

Status and Owner

As a task moves through the PowerAssist process, it changes:

- Status - to reflect what has happened or is about to happen
- Owners - as different people assume responsibility

The client is responsible at two stages (shown as **bold** *italics*):

- Creating the task
- Performing client testing

Status	Owner	Description
New	***Client***	Task is logged, and assigned to the default PHS user
Open	PHS Support Unit	Task has been assessed by the Support Unit and assigned to a developer.
Open	PHS Developer	PHS developer to investigate task and perform the code fix
Open	***Client***	Task is ready for the client to test, and check that it has been satisfactorily resolved Used after the code fix or reply to your query has been released to your site, for example: • Data Junction change has been loaded onsite • Patch or updated report has been installed • Complete release has been loaded onsite • Any resolution requiring a client site to test and confirm If resolution of task does not satisfactorily meet client expectation client is to reassign to PHS Support
Open	PHS Developer	Task failed internal developer testing, and the developer is reworking the code fix
Open	Client	Client to re-test resolution of logged task
Enhancement	PHS Enhancement	Task is deemed an enhancement, the solutions will be provided in a future release
Closed		Task has been completed

PowerAssist user definitions

Client User

Client PowerAssist users are able to:

- Log support tasks
- Monitor the progress of logged tasks as they are:
    - assigned to a developer and investigated
    - client liaison and resolution of logged support task
    - Returned to client for testing of resolution for support task
- Test the resolution
    - If support task resolution is unsatisfactory leave task status as open and reassign to PHS Support
- Continue to monitor the progress of tasks through each stage to closure
- Choose to receive email alerts that provide notification of task progression. This feature is configurable using the user account options

Client Manager

A Client Manager is a user who is in charge of a team of users. In addition to the normal Client User functions, Client Managers can also monitor all the support tasks logged by their team
Sections in this guide that are specific to Client Managers:

- Screens - *Team Tasks and Team Bugs screen*
- Procedure - *To view team tasks*

Stakeholder

A Stakeholder is a user who has an interest in the task, but is not the user that logged/created the task. A Stakeholder may be a Client User or a Client Manager.
Stakeholders are able to:

- View the task and add comments, but cannot perform any other functions such as reassigning task to other PowerAssist users or change status
- Receive email alerts notification of the progress of the logged task.

Sections in this guide that apply to Stakeholders:

- Screens - _My Tasks and My Bugs screen _
- Procedures - *Monitor and manage tasks - To add a comment*

User account options

Client Users, Client Managers and Stakeholders have the ability to maintain their own account details, including:

- Name, phone
- E-mail address, password - used for PowerAssist login
- Alerts - PowerAssist alerts, daily alerts, team alerts.

For more details, refer to:

- Screens - *User Account screen*
- Procedures Access - *To maintain your user account*

Definitions

Task	When a support call is logged in PowerAssist, it becomes a task for someone, eg developer. As the task progresses, it comes back to the client for testing, and that is when you see that support call in your **My Tasks** list
My Tasks	Tasks that require you to do something
Team Tasks	Tasks that require someone on your team to do something
Bug	When a support task is logged in PowerAssist, it becomes a task for someone, eg developer. When the task is not your responsibility, it is listed in your **My Bugs** list.
My Bugs	Tasks that have been logged by you, or have you as a stakeholder.
Team Bugs	Tasks that have been logged by someone in your team, or have someone in your team as a stakeholder

Screens

Common to all screens

Date and Time

- Dates and times are local to South Australia
- Dates are displayed in American format - *month/day/year*

Screen toolbar

Field	Description
[My Tasks]	Displays the main screen with My Tasks and My Bugs lists
[Team Tasks]	Displays the main screen, with My Tasks and My Bugs lists populated with the support calls logged by the entire team *Only displays for Client Managers*
[New Tasks]	Displays the New Task screen, for entering a new support task
[Account]	Displays the User Account screen, for changing your user account details
[Logout]	Logs the current user out of the PowerAssist system and displays the PowerAssist Login screen

Access

PowerAssist Login screen

Field	Description
Email address	Users email address is used as the login username
Password	Users PowerAssist password

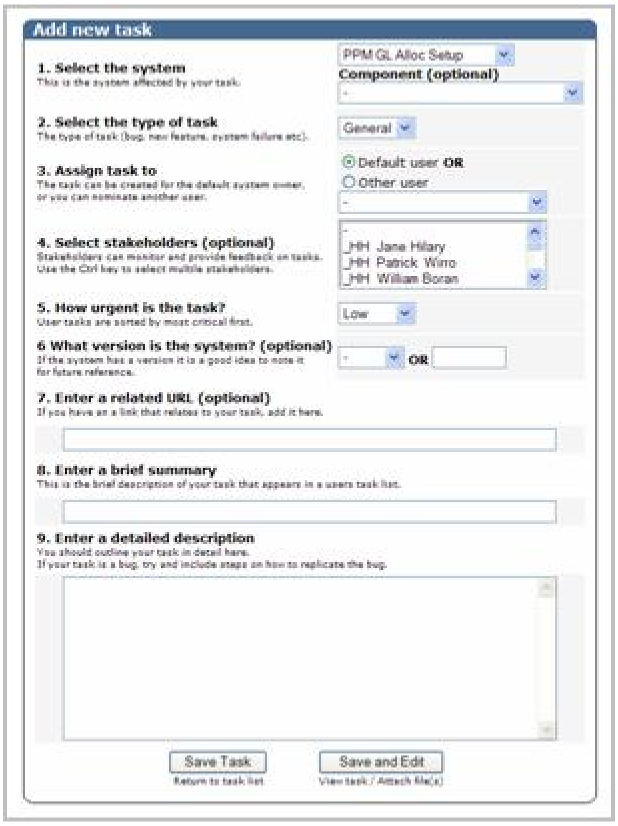
User Account screen

Field	Description
First name	User's first name
Last name	User's last name
Email	User's email address, which is used for logging in
Phone/Extension	User's phone number
Role	User's role, eg client user or client manager
New Password	To change user's password. Enter the new password here
Confirm Password	For changing your password. Re-enter your new password here

	to confirm
Manager	User's or Site's PPM manager. Select *~~None~~ or click on your site manager's name*
Task Display	Which task lists display on PowerAssist main screen, i.e. • My Tasks, • My Bugs, or • Both (default)
Default to Search	Scope of the search selected by default, eg all current, all closed, etc. If the user has a commonly performed search the user can save the search settings and set this search as a default
Receive PowerAssist Alerts	= Receive email alerts notifying user of the progress of user's logged PowerAssist tasks An e-mail alert is sent to: • task creators, task owners and stakeholders per each task creation or modification • managers on task creation or changes to status or urgency **Note:** This is turned on by default, and PHS recommends that it is left on
Receive Daily Alerts	= Receive daily email alerts for user's top priority tasks
Receive Team Alerts	= Receive email alerts for tasks logged by assigned team of users (available for Client Managers only). An email alert is sent everyday to Managers for team top priority tasks

Log tasks

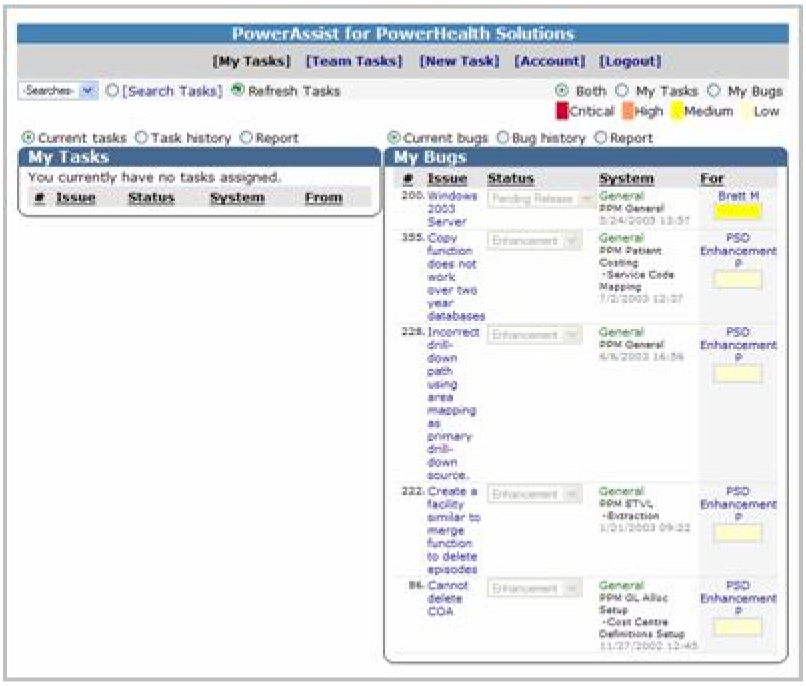
New Task screen



Field	Description
Select the system	Software product name If there is a Component field, select the appropriate component
Assign task to	Who to assign the task to. **Note:** Tasks must always be re/assigned to the PHS Support user when: • New • Open • Enhancement
Select stakeholders (optional)	Select stakeholders only if you want another person to follow this particular task. This should be restricted to a PowerAssist user within each organisation.
How urgent is the task?	Please refer to the agreed Service Level Agreement for a guide when selecting task urgency
What version is the system? (optional)	Select the version of the software for which you are logging the problem
Enter a related URL (optional)	Not currently in use
Enter a brief summary	Enter a summary of the problem in 10 words or less
Enter a detailed description	Enter a detailed description of the problem

Monitor and manage tasks

My Tasks screen (main screen)

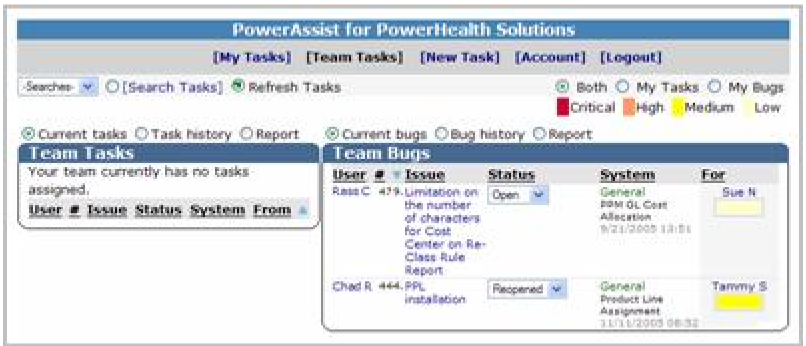


Field	**Description**
Searches	Allows selection of saved searches
[Search Tasks]	Displays the Search Tasks screen, for entry or search criteria
Refresh Tasks	○ = Screen is refreshed only when you press F5 ◉ = Automatically refreshes the screen (default)
Both	◉ = Display both My Tasks and My Bugs lists
My Tasks	◉ = Display My Tasks list
My Bugs	◉ = Display My Bugs list
My Tasks	
Current tasks	◉ = Display only the tasks that are current, i.e. not closed
Task history	◉ = Display only tasks that are closed
Report	Displays the Report screen, with report options
#	Task identification number • Click heading to sort list by this column • Click again to reverse the sort order
Issue	Description of the problem * Click heading to sort list by this column • Click again to reverse the sort order
Status	Status of the task, eg new, open, ready for client testing • Click heading to sort list by this column • Click again to reverse the sort order
System	Area of the system affected, type, and date/time created • Click heading to sort list by this column • Click again to reverse the sort order

From	Person who created the task • Click heading to sort list by this column • Click again to reverse the sort order
My Bugs	
#	Task identification number • Click heading to sort list by this column • Click again to reverse the sort order
Issue	Short description of the problem • Click heading to sort list by this column • Click again to reverse the sort order
Status	Task status, eg new, open, ready for client testing • Click heading to sort list by this column • Click again to reverse the sort order
System	Area of the system affected, type, and date/time created • Click heading to sort list by this column • Click again to reverse the sort order
For	Task owner and priority Priority is indicated by colour, as described in the top right corner of the screen Red = Critical Orange = High Yellow = Medium Pale yellow = Low • Click heading to sort list by task owner • Click again to reverse the sort order

Team Tasks screen

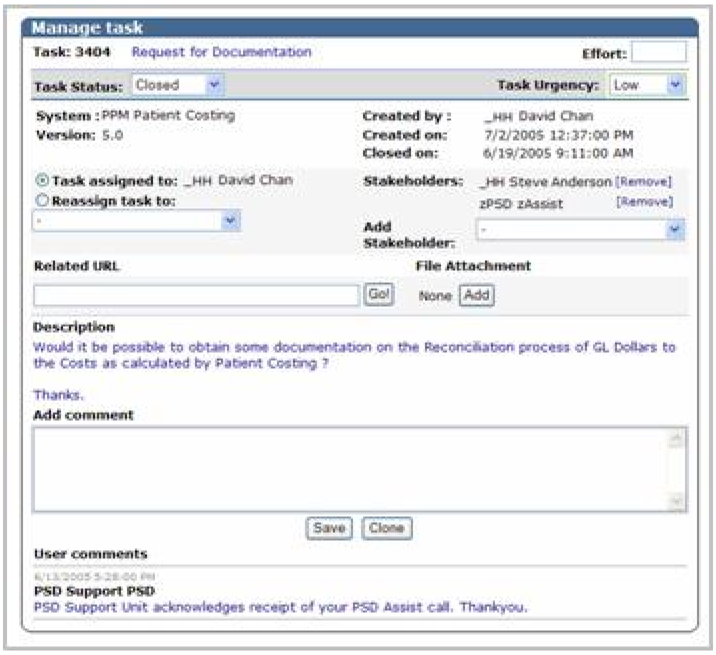
The **Team Tasks** screen is exactly the same as the **My Tasks** screen, except that it includes tasks from everyone in your team.



Field	Description
Team Tasks	
User	Client User who created the task • Click heading to sort list by this column

	• Click again to reverse the sort order
Team Bugs	
User	Client User who created the task • Click heading to sort list by this column • Click again to reverse the sort order

Manage task screen



Field	Description
Task	Task identification number and short description.
Effort	Not used.
Task Status	Status of the task. For a description of each task status, refer to *Task Status* in the Introduction section
Task Urgency	• Low • Medium • High • Critical For a description of each urgency, refer to your Service Level Agreement
System	The part of the system affected by the problem, eg PPM General, PPM GL Cost Allocation, PPM Database Build, etc.
Component	Component within the system affected by the problem, eg Cost Centre Definitions Setup, Exports, Reports, Validation Setup, etc.
Version	Software version used when the problem occurred
Created by	Person who logged the task
Created on	Date and time the task was logged
Task assigned to	Person currently responsible for working on this task

Reassign task to	Reassign the task to another person
Stakeholders	One or more people interested in this task
Add Stakeholder	Select one or more stakeholders to add to the existing list To select additional stakeholders: • hold down Shift+ click, or • hold down Ctrl+ click
Related URL	Not used
File Attachment	List of files already attached. Click **Add** to add more files
Description	Detailed description of the problem
Add comment	To add a comment, click in the **Add comment** field and start typing then click **Save**
User comments	List of comments entered for this task, with the most recent comment at the top

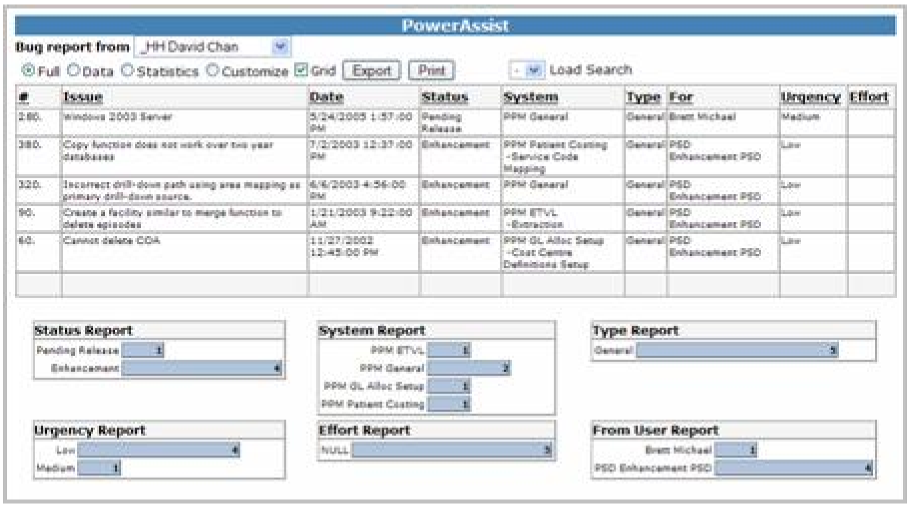
Reports

Task Report screen

Field	Description
Task report for	User that the report applies to
Options	Full = Display task list and statistics Data = Display task list only Statistics = Display statistics only Customize = Display Customize Report screen and specify fields to display Grid = Display column gridlines in the task list
Export button	Exports the contents of the report to export.csv, which can be opened using Microsoft Excel
Print button	Generates the report without the selection criteria in a new window and displays the Windows Print dialog, to print the report
Load Search	Loads saved searches
Status Report	Bar chart of tasks for each status in the report
Urgency Report	Bar chart of tasks for each urgency in the report
System Report	Bar chart of tasks for each system in the report
Effort Report	Bar chart of tasks for each effort in the report
Type Report	Bar chart of tasks for each type in the report

From User Report	Bar chart of tasks for each status in the report

Bug Report screen



Field	Description
Bug report for	User that the report applies to
Options	Full = Display task list and statistics Data = Display task list only Statistics = Display statistics only Customize = Display Customize Report screen and specify fields to display Grid = Display column gridlines in the task list.
Export button	Exports the contents of the report to export.csv, which can be opened using Microsoft Excel.
Print button	Generates the report without the selection criteria in a new window and displays the Windows Print dialog, to print the report
Load Search	Loads saved searches.
<u>#</u>	Task identification number* Click heading to sort list by this column* Click again to reverse the sort order
<u>Issue</u>	Short description of the problem • Click heading to sort list by this column • Click again to reverse the sort order
<u>Date</u>	Date/Time created • Click heading to sort list by this column • Click again to reverse the sort order
<u>Status</u>	Task status, eg new, open, ready for client testing • Click heading to sort list by this column • Click again to reverse the sort order
<u>System</u>	Area of the system affected • Click heading to sort list by this column • Click again to reverse the sort order

Type	Type of task • Click heading to sort list by this column • Click again to reverse the sort order
For	Task owner • Click heading to sort list by this column • Click again to reverse the sort order
Urgency	Task priority • Click heading to sort list by this column • Click again to reverse the sort order
Effort	Not used
Status Report	Bar chart of tasks for each status in the report
Urgency Report	Bar chart of tasks for each urgency in the report
System Report	Bar chart of tasks for each system in the report
Effort Report	Bar chart of tasks for each effort in the report
Type Report	Bar chart of tasks for each type in the report
From User Report	Bar chart of tasks for each status in the report

Customise Report Settings screen

The Report Settings screen allows you to select the PowerAssist database fields and specify display their options for the report.

Field	Description
Column	Name of the field column to display in the report screen

Label	Alternative label to replace the current one, eg task id may be labelled as #
Display	= Display this field in the task list = Do not display this field in the task list
Stats	= Display this field as a statistics chart = Do not display this field as a statistics chart
Total	= Display this field as a sum of other fields = Do not display this field as a sum of other fields
Bold	= Display this field in bold = Do not display this field in bold

Search

Search Tasks screen

Field	Description
Reset	Resets the search options to system defaults, eg *All*
Run Search button	Runs the search using the current options
System	Area of the system affected Select a system from the list or leave it set to _All To select multiple values, hold down CTRL and click.
Component	Leave it set to "All"
Type	Task type Select a type from the list or leave it set to *All* To select multiple values, hold down CTRL and click
Status	Task status Select a status from the list or leave it set to *All* To select multiple values, hold down CTRL and click
Urgency	Task urgency or priority Select an urgency from the list or leave it set to *All* To select multiple values, hold down CTRL and click
Task Creator	Task creator

	Select a user from the list or leave it set to *All* To select multiple values, hold down CTRL and click
Task Owner	Task Owner Select a user from the list or leave it set to *All* To select multiple values, hold down CTRL and click
Created	Date range within which the task was created To select all dates, just blank out both date fields
Closed	Date range within which the task was closed To select all dates, just blank out both date fields
Task ID	Unique number identifying the task If this field is entered, all other fields are not required
Version	Software version in which the problem occurred
Issue	Short description of the task
Description	Long description of the task
Comment	Text string, which occurs in one of the comments
Sort by	Column by which the search result is sorted, eg task id, user, etc.
Sort order	Sort order of the specified column, ie, ascending or descending
Save Search	Name under which to save these search settings Once saved, this search appears in the dropdown list to the left of **[Search Tasks]** in the top left corner. You can run the search at another session without re-entering the search details.
Save button	Save the search settings to the name specified in the Save Search field

Procedures

Access

To logon to PowerAssist

Go to the PHS website www.powerhealthsolutions.com
Select **Customer Support - Online Support - Logon to PowerAssist**
The **PowerAssist Login** screen displays:

- Username = your email address
- Password = initially provided by the PowerAssist Administrator
  [Password can be manually changed by user once initially logged in to PowerAssist]
  The **PowerAssist for PowerHealth Solutions** screen displays, with **My Tasks** and **My Bugs** lists displayed side-by-side.
  As a Client User, you will generally have nothing listed under **My Task** unless you have been assigned tasks for closure or for supplying further information (see *To own a task*)
  The **My Bugs** list displays:
- Tasks that you have logged/created yourself and
- Tasks for which another user has made you a Stakeholder

To access Knowledge Base Documentation

Check the PHS website before you report a major software defect, as the problem may already have been reported and a suggested workaround already defined

- Go to the PHS website www.powerhealthsolutions.com

- Select **Customer Support - Knowledge Base**
- The webpage displays with the following links:
    - Known Issues
    - Frequently Asked Questions
    - Latest Documentation

To access **Known Issues** and **Frequently Asked Questions** , use your PowerAssist username and password.

Note: Any changes to your password in PowerAssist will not be automatically updated at the PHS website. If you require the login passwords to be the same for both PowerAssist and the PHS website, notify PHS by logging a PowerAssist task.

To access **Latest Documentation** use:

- Username: psdproducts
- Password: powerup

Note: Alternatively, you can use an FTP Client to log into ftp.powerhealthsolutions.com using the same passwords

To access **User Manuals** you need to use a login specific to your site

- Username: your site acronym
- Password: assigned by PowerAssist Administrator

Your site acronym is e-mailed to your site. If you are not sure of yours, please log a Power Assist "Requesting Site User Manual Credentials".

Note: Alternatively, you can use an FTP Client to log into ftp.powerhealthsolutions.com using the same passwords

To maintain your user account

Available from any PowerAssist screen:

- Click on **[Account]** and the **User Account** screen displays
- Make the required changes
- Refer to **User Account** screen section for a description of each field
- Click **Save**

Screen options

To display My Tasks only

Available from the **My Tasks** screen:

- Click on ◯ **My Tasks** on the top right corner and the screen will display the **My Tasks** list only

To display My Bugs only

Available from the **My Tasks** screen:

- Click on ◯ **My Bugs** on the top right corner

The screen will display the **My Bugs** list only

To display both My Tasks and My Bugs

Available from the **My Tasks** screen:

- Click on ◯ **Both** on the top right corner and the screen will display both **My Tasks** and **My Bugs**

To sort the list by a column

At the **My Tasks** or **My Bugs** list:

- Click on the heading of the column you wish to sort by and the list is sorted by the selected column
- The column heading displays with a vertical blue arrowhead (▼ or ▲) indicating the direction of the sort i.e. ascending or descending

To sort the column in the opposite order, click on the column heading again. The list is sorted by the selected column, in the opposite direction.

To display closed tasks

Available from the **My Tasks** list:

- Click on **Task history**
  - **My Tasks** displays all tasks with the status **Closed**

Log task

To add a new task

Before reporting a task, check for an existing workaround or solution on the PHS website. Refer to *To Access Customer Support Documentation*

Available from any screen once logged into PowerAssist:

- Click on **[New Task]** and the **Add new task** screen displays
- Enter the required details
- Refer to ***New Task screen*** for a description of each field
  To save and return to the main screen click **Save** and the main screen displays

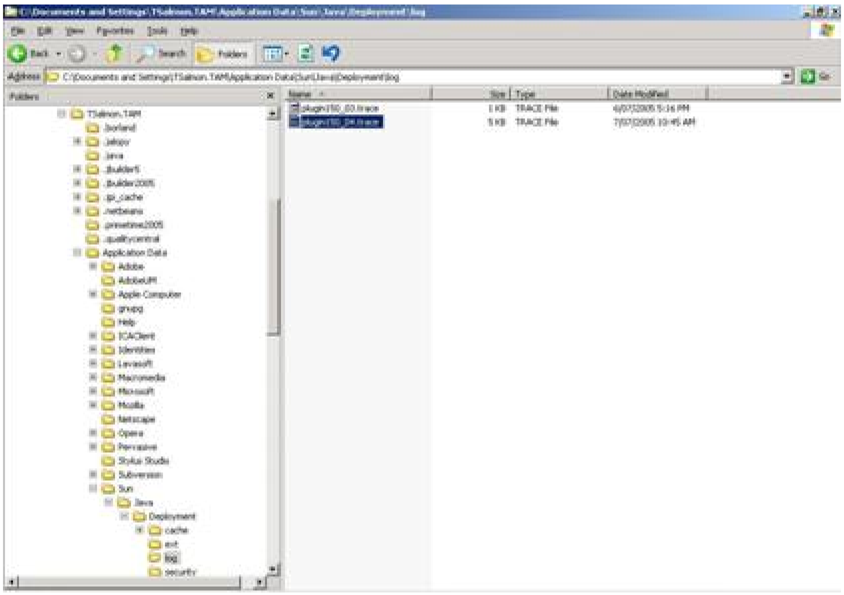
To save and add stakeholders or attachments

- Click **Save and Edit**
- The **Manage Tasks** screen displays
- Refer to ***Manage Tasks screen*** for a description of each field
- Add additional stakeholders or attachments
- Click **Save** and the main screen displays
  - When you return to the main screen, your task displays on the right hand side list under **My Bugs**

Attachments

Attachments can be any supporting documents for the task, such as:

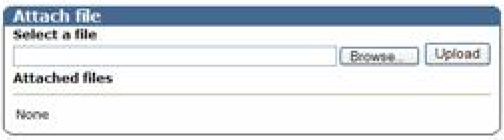
- Import files
- Screen captures
- Error messages
- The plugin[java version].trace file, which is required for problems suspected to be a product fault. This is found in:
  C:\Documents and Settings[your user folder]\Application Data\Sun\Java\Deployment\log\



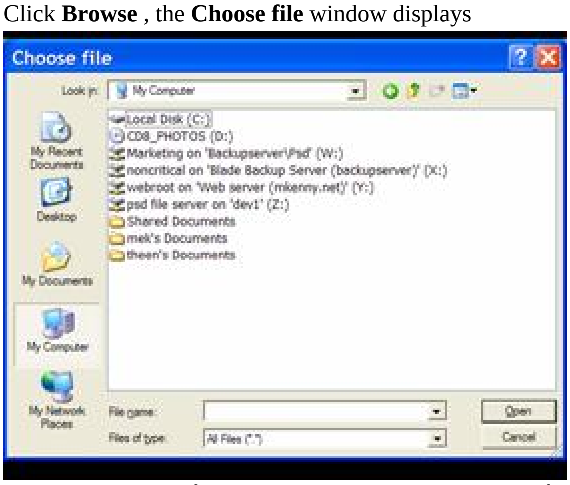
To add an attachment

Available from the main PowerAssist screen:

- Click on the task name in the **Issue** column and the **Manage Task** screen displays with details for the selected task.
- At the File Attachment section, click **Add** and the **Attach File** window displays.



- Click **Browse** , the **Choose file** window displays



- Select the required file and click **Open** and the selected file displays in the **Select a file** field

Click **Upload** . The upload progress displays as coloured bars at the bottom of the **Attach file** window
When the upload completes

- The filename displays in the **Attached files**
- Close the window
- At the **Manage Task** screen, check that the attachment is there

If there is an upload error

- Close the window
- At the **Manage Task** screen, check that the attachment is there
- If the attachment is not there, try uploading again
- Click **Save** and the **My Tasks and My Bugs** screen displays

To view an attachment

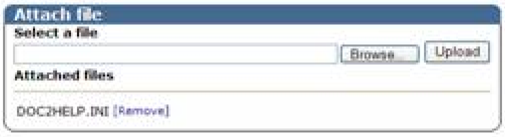
At the main screen:

- Click on the task name in the **Issue** column and the **Manage Task** screen displays with details for the selected task
- Click on the filename link, under **File Attachment**
- The contents of the selected file display in a separate window

To delete an attachment

At the main screen:

- Click on the task name in the **Issue** column and the **Manage Task** screen displays with details for the selected task
- Click **Add** button and the **Attach File** window displays



- At the **Attached files** list, click on **[Remove]** next to the required file attachment
- A confirmation message displays

- Click **OK** and the file attachment is deleted

Monitor tasks

To view team tasks

At any screen:

- Select **[Team Task]** in the top bar and the **Team Task** screen displays with both **Team Tasks** and **Team Bugs** lists.
- Refer to ***My Tasks screen*** and ***Team Tasks screen*** for a description of each field

To view user details

At **My Tasks** screen:

- Hover the mouse over the user's name in any of these columns:
  - **From**
  - **For**
- The user's full name, phone extension (if present) and email address of the user displays

At the **Team Tasks** screen:

- Hover the mouse over the user's name in any of these columns:
  - **User**
  - **From**
  - **For**
- The user's full name, phone extension (if present) and email address of the user displays

To view task details

At the main screen:

- Click on the task name in the **Issue** column and the **Manage Task** screen displays with details for the selected task

To edit task details

At the main screen:

- Click on the task name in the **Issue** column and the **Manage Task** screen displays with details for the selected task
- Refer to ***Manage Task*** screen for a description of each field
- You can edit the task details to:
  - Add a comment as additional information
  - Add attachments as additional information
  - Add a stakeholder
- Change task status to **Closed**
- Review tasks with status **Open** and ensure that after recording any dialogue and additional information that you assign the task to the PHS Support user
- Click **Save**

Note: that if you are a Client Manager, you cannot close someone else's task. Only the task creator can close that task

To add a comment

People who can add comments to a task are:

- The task creator
- The task owner
- All stakeholders
- PHS Support

At the main screen:

- Click on the required task. The **Manage Task** screen displays
- Click in the **Add comment** field, and start typing your comments
- Click *Save.

- Note: Do not click **Save** more than once, otherwise the new comment is added again each subsequent time you click **Save**. ***These cannot be deleted***. The task owner, creator, and all stakeholders will receive email notification of the comment

To supply more information about the task

At the main screen:

- Click on the required task and the **Manage Task** screen displays.
- If the task is assigned to you, reassign it to PHS Support so that PHS staff will receive email notification of your comment
- You can supply information by:

    - Adding an attachment
    - Adding a comment
- Click **Save**

Note: Please do not use email to communicate additional information and dialogue between PHS Support, clients and PowerAssist users. It is important that all dialogue is recorded through PowerAssist to ensure PHS Support and PowerAssist users have a record.

To send an email

Please do not use email to communicate a task that could be logged into the PowerAssist system. It is important that all dialogue is recorded through PowerAssist to ensure PHS Support and PowerAssist users have a record

At the **My Tasks and My Bugs** screen:

- Click the name of the person at any of these columns:
    - **From**
    - **For**

A new email displays, to with the person you selected.
Complete the rest of the email message and click **Send**

At the **Team Tasks and Team Bugs** screen:

- Click the name of the person at any of these columns:
    - **User**
    - **From**
    - **For**

A new email displays, to with the person you selected
Complete the rest of the email message and click **Send**

PowerAssist is Down

Use email to log tasks only if the PowerAssist system is unavailable to powerassist@powerhealthsolutions.com

To monitor task progress

Refer to the Overview sections *PowerAssist process* diagram and the *Status and Owner* table

At the main screen:
My Bugs list

- Scan the list for tasks being worked on by someone else (assigned to a user other than you)
- The current status of the task and person responsible can be viewed
- For more details on a specific aspect of a task, click on the **Issue** column for that task
- The **Manage Task** screen displays with full details, eg history of comments

My Tasks list

- Scan the list for tasks with status **Open**
- Test the tasks by following the recommended solution by PHS Support and record the result in the comments section.
- If solution provided by PHS Support is not successful and does not meet PowerAssist user satisfaction, reassign task owner to PHS Support. Task status will remain **Open**
- Once the PowerAssist user has tested the provided solution to a logged task and it meets the PowerAssist users satisfaction,

change status to **Closed** leaving the task assigned to the PowerAssist user who created the task

Note: If you are a Client Manager, you cannot close someone else's task. Only the task creator can close a task.

Closed tasks

To notify PHS Support a task did not pass client testing

Please Note *Please test your task within specified number of working days of the task being assigned to you, or notify PHS if you are unable to perform testing within this time frame by recording a comment. If feedback is not received within allocated time frame for task priority, task will be automatically downgraded by PowerAssist*

Logged Status	No Client response after number working days	Downgraded to status of
Critical	3	High
High	7	Medium
Medium	10	Low
Low	20	Closed

At **Manage Task** screen:

- Assign the task to the PHS Support user by:
  - checking **Assign To** and selecting the PHS Support user from the dropdown list

Note: Failure to do this may result in the task not being responded to, or not responded to in due time

- Add a comment describing how and why the task failed.
- Task will continue to have status as **Open**
- Click **Save.** PHS will reassign the task for review and further investigation to the task

To close a successful task

Only the person who created the task can close it

At **My Tasks** screen:

- At the required task, select **Closed** at the **Status** column
- The task disappears from the list
- At the **Manage Task** screen:
  - At the **Task Status** field, select **Closed**
  - Click **Save** the main screen displays and the closed task is no longer listed

To find a closed task

Using [Search Tasks]

At the main screen:

- Click on **[Search Tasks]** and the **Search Tasks** screen displays
- Refer to ***Search Tasks screen*** for a description of each field
- Set Status to **Closed**

- Specify a realistic date range of when the task was closed
- Specify any other task details you can remember
- Click **Run Search** . The matching tasks display in the **Task Search Results** list. You cannot change the status of a task from the search list
- Click on the task issue and the **Manage Task** screen displays and be aware that you can only reopen the task at the ***Manage Task*** screen

Note: This is the most effective method of finding a closed task, as it searches across tasks and bugs

Using History

At the main screen:

- Click on
  Task History above the **My Tasks** list
  or
  Bug History above the **My Bugs** list
- A list of closed tasks/bugs will display
- Scroll through to find the required closed task

Note: Use the Find function in the web browser (usually Ctrl+F) to search for a text string that is part of the task and that a task may be in **My Task** or **My Bugs** . If it is not in one list, look for it in the other list

Issue reoccurs that relates to a previously logged task

You need to find the closed task and number that issue previously related to
When you have found the task log a new PowerAssist task and refer to section *Log Task - New Task*

- Ensure previously related task number and additional description of issue is recorded in description of PowerAssist task
- Assign the task to the **PHS Support** user
- Click **Save**

Reports

To generate a task report

Reports displays information in a print-friendly format, and can either be printed on paper or exported to a CSV file.

At the main screen:

- Click on **Report** radio button above the **My Tasks** list
  The **Task Report** screen displays in a new window
- Refer to ***Task Report screen*** for a description of each field

Your username defaults in the user field, to show your tasks or bugs
Client Managers can select different users for the report
The full report displays as a list of tasks (data), as well as a collection of bar charts (statistics):

- You can select data only, or statistics only
- You can also customise the report to specify which fields to display

To generate a bug report

Reports displays information in a print-friendly format, and can either be printed on paper or exported to a CSV file.

At the main screen:

- Click on **Report** radio button above the **My Bugs** list
  The **Bug Report** screen displays in a new window
- Refer to ***Bug Report screen*** for a description of each field

Your username defaults in the user field, to show your tasks or bugs
Client Managers can select different users for the report
The full report displays as a list of tasks (data), as well as a collection of bar charts (statistics):

- You can select data only, or statistics only
- You can also customise the report to specify which fields to display

To export a report

At the **Task Report** or **Bug Report** screen:

- Click **Export** . A warning message displays

- If you click **Open** , the file opens in Excel
- If you click **Save** , the **Save As** dialog displays
- Save the file to the required folder and filename

To print a report

At the **Task Report** or **Bug Report** screen:

- Click **Print** . The report redisplays in a new window, without the selection criteria
- The Print dialog displays

- Select the required printer and click **Print** and the report is printed

To customise the report screen

At the **Task Report** or **Bug Report** screen:

- Click on **Customize** option button and the **Report Settings** screen displays
- Refer to ***Report Settings screen*** for a description of each field
- Fields in the PowerAssist database can be displayed or hidden, in the:
    - data table
    - statistics bar chart
    - as a total field
    - in bold
- Select the required options for the fields
- Click **Save** . The report settings are saved
- Click **Full** option button. The **Reports** screen displays with the saved settings

Searches

To run a search

At the main screen:

- Click **[Search Tasks]** near the top left of the screen. The **Search Tasks** screen displays
- Refer to ***Search Tasks screen*** for a description of each field

Select the details that describe known information of the searched task

Note: To select multiple fields, use Shift or Control and to select all dates for a field, set the date field to blank

- Click **Run** to run the search

To save the search for future use

At the main screen:

- Click **[Search Tasks]** near the top left of the screen and the **Search Tasks** screen displays
- Check the search details are set correctly
- Enter a meaningful name in the **Save Search** field
- Click **Save**

The saved search will appear in the dropdown list to the left of* [Search Tasks]* in the top left corner of the main screen. You can run the search at another session without re-entering the search details

To re-run a saved search

At the main screen:

- Click on the **~~Searches~~ field near the top left corner of the screen, and select a saved search**

The **Search Tasks** screen displays with the settings from the saved search

- Click **Run Search**

To re-run your last search

At the main screen:

- Click on ◯ to the left of **[Search Tasks]**
  Note: Make sure you click on the radio button, and not the words

The most recent search is run, without going through the **Search Tasks** screen, displaying the **Task Search Results**
Note: You may need to review the details for the search, if the required result is not achieved

To review details of your last search

The **[Search Tasks]** function retains details from your last run search, so you can review them if you have run a saved search (which does not display the **Search Tasks** screen)

At the main screen:

- Click **[Search Tasks]** near the top left of the screen. The **Search Tasks** screen displays
  Check the details
- Click Run