

ACCESS97 Documentation Item Tracking Application

For HealthWare Solutions International Baltimore, MD

Powered by Global Solutions 02/02/99

CONFIGURATION DETAIL

This document defines the configuration detail of a proprietary change management application written for Healthware Solutions. The company has put its completion on hold. The application serves as a database of documents to catalog and track their changes as well as the approval procedures by owners for such changes. The company defined documents as anything published including job descriptions. While it could be adapted to track software code changes, it has not been configured to do that in the current version.

Figure 1. Configuration Table

Object	Use
Welcome Screen	Log on with Name, to open either administration or user screen.
User Information Table	Stores user name, ID, date/time accessed application, based on name selection at logon.
User Info Screen	Displays user access for maintenance. Provides a reset capability and print feature.
Administration Menu Screen	Displays command buttons under titles: <i>File Maintenance</i> – Item Catalog, User Access Information, Personnel, Administrators, Categories, Department, Department Approvers, Facilitation, Where Used, Change Request. <i>Operations</i> – Send Memo, Generate Reports, Distribute Reports. REQ: The <i>Operations</i> buttons are inoperative. Capability to print a report of a selected item or complete listing is enabled for various screens.
Memo Options Screen	Buttons to access various options REQ: Further define memos, code, print
Report Options Screen	Buttons to access various options REQ: Further define memos, code, print
Distribute Reports Options Screen	Buttons to access various option REQ: Further define memos, code, print

Object	Use
<i>Personnel Table</i>	Stores personnel information: personnel ID, category, department, unit, job title, email, telephone, postal address, reports to.
Personnel Screen	Displays personnel records for maintenance.
<i>Skill Set Table</i>	Stores skill sets by person
Skill Set Screen	REQ: To maintain records
<i>Skill Set Person Link Table</i>	System maintained
<i>Job Openings Table</i>	Stores Item ID that represents job description, providing interview records of candidate, hiring manager, if required.
<i>Administrators Table</i>	Stores administrators ID, name.
Administrators Screen	Displays administrator records for maintenance. REQ: Find, edit, add controls
<i>Approver Table</i>	Stores prime, alternate and non-member approvers by Department
Approver Screen	Displays approver records for maintenance. REQ: Command button to filter items to approve and Dialog box to highlight those to view or print
<i>Department/Approver Link Table</i>	System maintained
<i>Person/Approver Link Table</i>	System maintained
<i>Person/WriterRevisor Link Table</i>	System maintained
<i>Department Table</i>	Stores department name and code.
Department Screen	Displays department records for maintenance. REQ: Find, edit, add controls
<i>Categories Table</i>	Stores document information type, code and description.
Categories Screen	Displays category information for maintenance. REQ: Find, edit, add controls

Object	Use
<i>Item Catalog Table</i>	Stores document information: Item No., Revision No., Item ID, information type, title, editor, tech writer, document status, revision status, description, comments, number assigned date, target write date, approval circulation date, target approval date, published date, obsoleted date, change request status, description, comments, hyperlink to source document.
ItemCatalog Administration Screen	Displays all records for item maintenance. Contains command buttons for synchronized Facilitation, WhereUsed, Change Request forms. Filters are applied to show only those items that have instances on these screens. The custom toolbar can be used to view all items on these sub forms.
User Main Menu Screen	Displays <i>Command buttons</i> : View all items, View my items, View report options. REQ: Sub forms to view user approval items, change request items, report options
User View All Screen	Displays all records to view, including hyperlink with command buttons to view Approvals, WhereUsed and Change Request datasheets. REQ: Command button to use same screen to filter by item catalog field attribute
<i>Revision Status LookupTable</i>	System maintained
<i>Change Request Status LookupTable</i>	System maintained
<i>Facilitation Table</i>	Item approval storage
Facilitation Screen	Displays Item ID, Title, Writer/Revisor, Approving Dept. for maintenance. Synchronized with the Item Catalog screen if open.
Facilitation Summary Datasheet Screen	Displays all facilitation records as table for both administrators and users. REQ: Command button for User to view own approval items and approve or not
<i>Item Catalog/Facilitation Link Table</i>	System maintained

Object	Use
Where Used Table	Where Used storage
Where Used Screen	Displays Item ID and where used ID, Title. Synchronized with the Item Catalog screen if open.
Where Used Search	
Where Used Summary Datasheet Screen	Displays all where used records as table for both administrators and users.
Item Catalog/Where Used Link Table	System maintained
Change Request Table	Change Request storage
Change Request Screen	Displays Item ID for change, dates, department requestors, approvers, and reason for change, description. Synchronized with Item Catalog screen if open.
Change Request Summary Datasheet Screen	Displays all change request records as table for both administrators and users. REQ: Command button for User to view own change request items and implement as needed
Custom Toolbar	Used to access functions without going into individual screens. <i>Menu selections:</i> FILE – close, save, delete record, print preview, print, previous files accessed, exit. EDIT – undo typing, cut, copy, paste, paste as hyperlink. SEARCH – find by clicking in any field and typing word or string will select first, next, etc. APPROVALS – maintenance screen, summary sheet. WHERE USED – maintenance screen, summary sheet. CHANGE REQUEST – maintenance screen, summary sheet. WINDOW – standard functions. WEB - forward/back arrows. REQ: APPROVALS - User approver screen and PRINT REPORTS
Status Bar Text	Appears on the bottom status bar
Control Tip Text	Appears when cursor is passed over control.
Automation	Utilized in the memo function to interface with MS Word. Presently, files found must be individually opened and standard Windows Find utility employed. REQ: Implement when files are in one directory to search individual documents.

Configuration Considerations

The configuration table shows REQ: where work must be done in order to make the application workable as a simple change management system. Overall, the usefulness of the product requires the refining of the item catalog search facility, additional report configuration, and implementation of email report distribution re document status.

System automatically enters applicable data if information already exists in database.

Current searching capabilities only apply to the items entered in the catalog - not the source documents. The application will identify the documents that contain the attribute or key words - only if they have been entered in some field on the Item Catalog screen. The description field is vital here. It must contain the core of the source document. Once the Item ID's are filtered and displayed, the source document must be accessed with the link and searched again for key words with the standard Windows Find utility. Bookmarks can be placed in the source document that can be referenced by Access and the document itself can be brought into Access and searched. If the directory structure has been defined to include all files in root directory, saved in rich text format, code can be written to call each document and open it in Access to search it based on the criteria.

Display Conventions

Screens will be sized correctly in the delivered application and no toolbars but customized ones will be available.

To use other applications, minimize screens to reveal network desktop.

Multi-user Environment

The application has been written using Access on a network with the default for users to open program in shared mode. Forms are set at read-only. This way the Microsoft jet engine will handle any updating conflicts. Update and refresh times are written in the database. Only the Documentation Manager, as Administrator, will make changes and Approval Forms for other managers can be accessed only with password identification.

As needed, workgroups can be established that will store information about users, including their account names, passwords, groups to which they belong, and their preferences.

Testing

Error trapping, addition of appropriate user messages and form clarity will be reviewed and corrected if necessary during beta testing.

APPLICATION SCREENS

Figure 2. Opening



Figure 3. User Access

The screenshot shows a window titled "HSI - User Access" with a "Close" button in the top right. Below the title bar is a label "Application Access Details". The main content is a table with three columns: "ID", "Name", and "Date/Time of Access". At the bottom of the window are two buttons: "Clear Records and Reset File" and "Print Report".

ID	Name	Date/Time of Access
00044	ZanFagna,Joyce	9/10/99 1:10:21 PM
00044	ZanFagna,Joyce	1/27/99 10:57:02 PM
00041	Viau,Virginia	1/27/99 6:02:42 PM
00030	Dales,Dana	1/27/99 5:59:03 PM
00044	ZanFagna,Joyce	1/27/99 5:56:42 PM
00044	ZanFagna,Joyce	1/23/99 10:34:18 AM
00044	ZanFagna,Joyce	1/22/99 3:31:53 PM

Figure 4. Administrator Main Menu

The screenshot shows a window titled "HSI - Administration Menu" with a "Close Form" button in the top right. Below the title bar is a label "HSI Documentation Item Tracking". The main content is a menu titled "ADMINISTRATION" with two sub-sections: "File Maintenance" and "Operations".

File Maintenance

- ITEM Catalog
- Personnel
- Categories
- Department Approvers
- Change Request

Operations

- User Access Information
- Administrators
- Department
- Facilitation
- Where Used

Other Options:

- Send MEMO
- Generate REPORTS
- Distribute REPORTS

Figure 6. Personnel Listing/Maintenance

The screenshot shows a window titled "HSI - Personnel". At the top, there is a tab labeled "HSI Documentation Item Tracking" and a button "Print complete Personnel list by NAME". Below this is a "PERSONNEL" section with a "Find Record" dropdown menu set to "00041". The main form contains the following fields:

ID Number	00041		
Category	Consultant		
Name	Viau, Virginia		
Department	Documentation Systems	Title	Manager
Unit	Documentation Design		
Telephone	410.539.4361		
E-Mail	ginnie.viau@healthware.net		
Postal Address	100 Harborview Drive #611		
City	Baltimore		
State	MD	ZipCode	21230
Reports To	Dales, Dana		

At the bottom of the form are buttons for "Add", "Edit", "Save", "Undo", and "Delete Record". A status bar at the very bottom shows "Record: 27 of 37".

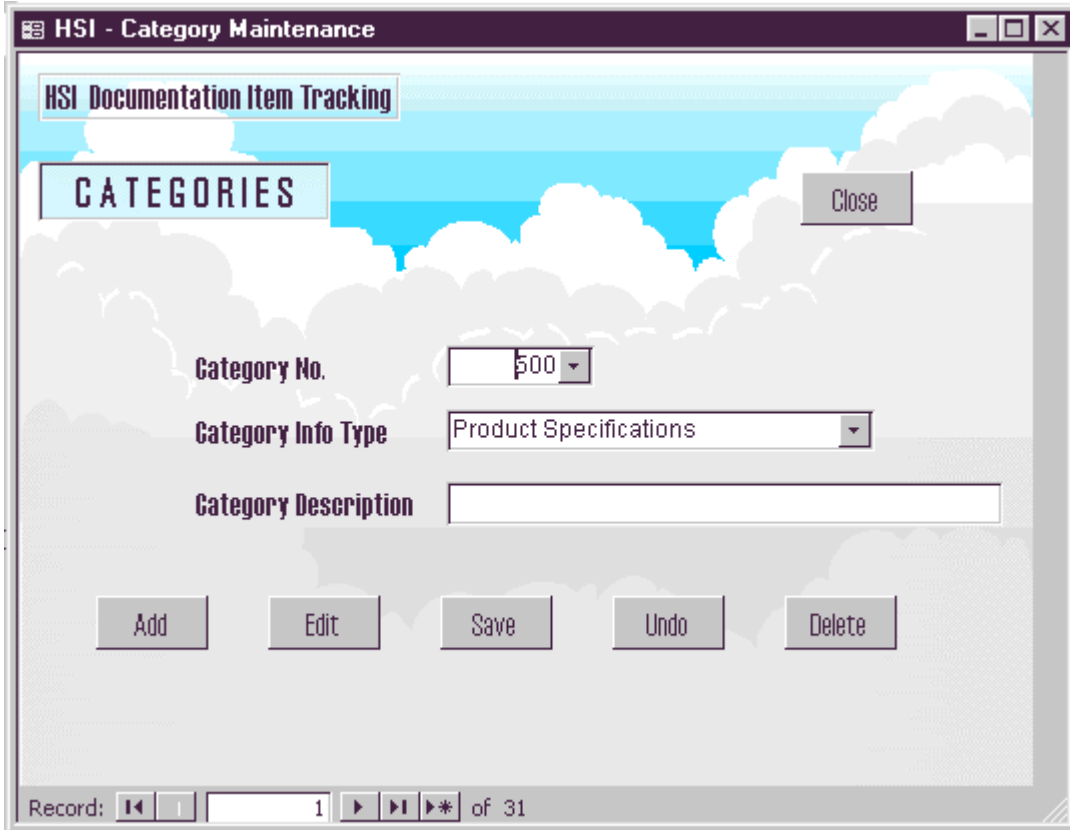
Figure 7. Administrator Listing/Maintenance

The screenshot shows a window titled "HSI - Administrators". At the top, there is a tab labeled "ADMINISTRATORS" and a "Close" button. The main form contains the following fields:

Personnel ID	00031
Name	Gamber, Glenn

At the bottom of the form is a status bar that reads "Record: 1 of 3".

Figure 8. Category Listing/Maintenance



The screenshot shows a software window titled "HSI - Category Maintenance". At the top, there is a header "HSI Documentation Item Tracking" and a sub-header "CATEGORIES". A "Close" button is located in the top right corner. The main form area contains three fields: "Category No." with a dropdown menu showing "500", "Category Info Type" with a dropdown menu showing "Product Specifications", and "Category Description" with an empty text box. Below these fields are five buttons: "Add", "Edit", "Save", "Undo", and "Delete". At the bottom, there is a record navigation bar with the text "Record: 1 of 31" and navigation icons.

Figure 9. Department Listing/Maintenance



The screenshot shows a software window titled "HSI - Department Maintenance". At the top, there is a header "HSI Documentation Item Tracking" and a sub-header "DEPARTMENTS". A "Close" button is located in the top right corner. The main form area contains two fields: "Dept ID" with a dropdown menu showing "100" and "Function/Location" with a dropdown menu showing "Executive". Below these fields are five buttons: "Add", "Edit", "Save", "Undo", and "Delete". At the bottom, there is a record navigation bar with the text "Record: 1 of 19" and navigation icons.

Figure 10. Item Catalog Entry, Page 1

HSI - Item Catalog

HSI Documentation Item Tracking

MAINTAIN ITEMS [Print Item Catalog Listing](#) [Find Record](#) 00001-000

Item No. 00001 Info Type Product Specifications Revision Status

Item ID 00001-000 Revision No. 000 None

Title ALQMS Functional Specification [Click Hyperlink below to view document](#)
[C:\My Documents\500-0001 ed.doc](#)

Status Not Written [Open Approvals Form](#)

Editor Gamber, Glenn [Open Where Used Form](#)

Tech Writer Gamber, Glenn [Change Request Status](#) None [Open Change Request Form](#)

[ADD](#) [EDIT](#) [UNDO Record Entry](#) [DELETE](#) [SAVE](#) Page 1 2

Record: 1 of 153

Figure 11. Item Catalog Entry, Page 2

HSI - Item Catalog

HSI Documentation Item Tracking

MAINTAIN ITEMS [Print Item Catalog Listing](#) [Find Record](#) 00001-000

Number Assigned Date 5/17/98 Target Write Date

Approval Circulation Date Target Approval Date

Published Date Obsolete Date

Description Overview of functional modules of ALQMS product

Comments

[ADD](#) [EDIT](#) [UNDO Record Entry](#) [DELETE](#) [SAVE](#) Page 1 2

Record: 1 of 153

Figure 12. Approval Facilitation

HSI - Facilitation Maintenance Form

FACILITATION Refresh Close

Find Record: 000001 Facilitation ID: 000001

Item ID: 00001-000

Item Title: ALQMS Functional Specification

Responsible Dept: Product Marketing

Writer/Revisor: Jackson,Doty

Approving Dept: Technical Development

Approver: Dales,Dana

Add Edit Open Summary Table Undo Delete Save

Record: 1 of 50

Figure 13. Facilitation Summary Table

HSI - Facilitation Summary Table

Item Title	Responsible Dept	Writer/Revisor	Approving Dept	Approver
ALQMS Functional Specification	Product Marketing	Jackson,Doty	Technical Development	Dales,Dana
ALQMS Functional Specification			Product Marketing	Jackson,Doty
ALQMS Functional Specification			Executive	Jackson,David
ALQMS Functional Specification			Outside Consultant	Eberhardy,Jeanette
ALQMS Business Concepts Description	Product Marketing	Jackson,Doty	Product Marketing	Jackson,Doty
ALQMS Business Concepts Description	Outside Consultant	Eberhardy,Jeanette	Outside Consultant	Eberhardy,Jeanette
ALQMS Business Concepts Description			Technical Development	Yao,Jack
TQMS Business Concepts Description	Product Marketing	Jackson,Doty	Product Marketing	Jackson,Doty
TQMS Business Concepts Description			Technical Development	Dales,Dana
TQMS Business Concepts Description			Executive	Jackson,David
All Products Functional Specification	Product Marketing	Jackson,Doty	Product Marketing	Jackson,Doty
All Products Functional Specification			Technical Development	Dales,Dana
All Products Functional Specification			Executive	Jackson,David
All Products Design Specifications	Product Marketing	DuBose, Anita	Technical Development	Yao,Jack
All Products Design Specifications	Technical Development	Yao,Jack	Product Marketing	Jackson,Doty

Record: 1 of 50

Figure 14. Change Request Maintenance, Page 1

CHANGE REQUEST Refresh Close

Find Change Request Change Request No. 000001

Item ID 00002-000 Status Pending1

Item Title ALQMS Business Concepts Description

Date Entered 1/12/99

Target Change Date

Description TestChange1

Reason for Change TestChange1

Add Edit Undo Open Summary Table Save Page 1 2

Record: 1 of 2

Figure 14. Change Request Maintenance, Page 2

HSI - Change Request Maintenance Form

CHANGE REQUEST

Refresh Close

Find Change Request Change Request No. 000001

Requester Wroe, David

Requester Dept Board of Directors

Responsible Person Jackson, David

Responsible Dept Board of Directors

Approver Cyran, Jane

Approving Dept Finance

Add Edit Undo Open Summary Table Save Page 1 2

Record: 1 of 2

Figure 15. Change Request Summary Table

HSI Change Request Summary Table

Request No.	Item ID	Date Entered	Target Change Date	Description	Reason for Change
000001	00002-000	1/12/99		TestChange1	TestChange1
000002	00004-000	1/12/99		testdata2	testdata2

Record: 1 of 2

Figure 16. Where Used Maintenance

WHERE USED Close WU ID 000001

Find Where Used Record to Edit: 00023-000

Item ID: 00023-000

WU Item ID	Where Used Item Title
00024-000	Distribution Notification Form

Buttons: Add, Edit, Undo, Refresh, Open WhereUsed Summary, Delete Record, Save

Record: 1 of 14

Figure 17. Where Used Summary Table

Item	Where Used
00002-000	00001-000 ALQMS Functional Specification
00002-000	00025-000 Glossary of Product Related Terms
00023-000	00024-000 Distribution Notification Form
00054-000	00007-000 Numbering and Category Definitions
00054-000	00008-000 Function/Location Codes
00054-000	00055-000 Documentation Formatting
00054-000	00056-000 Documentation Processing
00054-000	00023-000 Approval and Distribution Guidelines and Procedures
00054-000	00059-000 Obsolescence Procedure
00054-000	00057-000 Corporate Security and Access Rights Procedures
00054-000	00058-000 Record Retention

Figure 18. User Menu

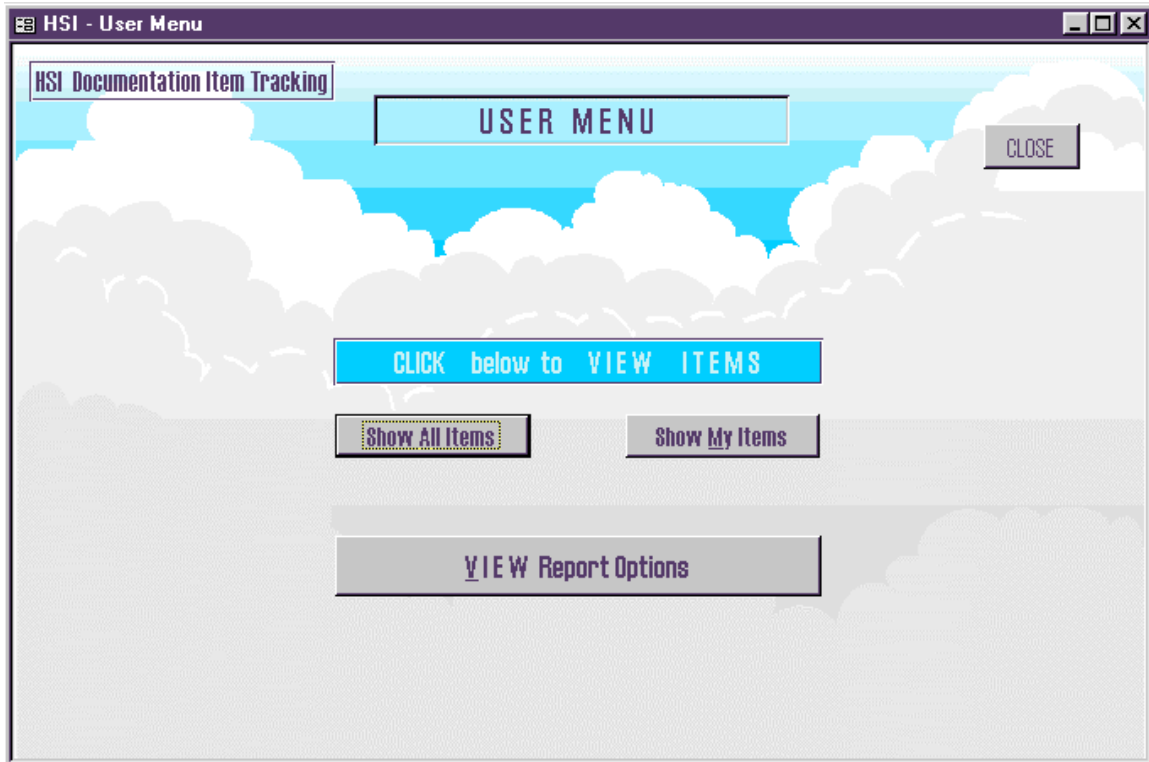


Figure 19. User Item Catalog

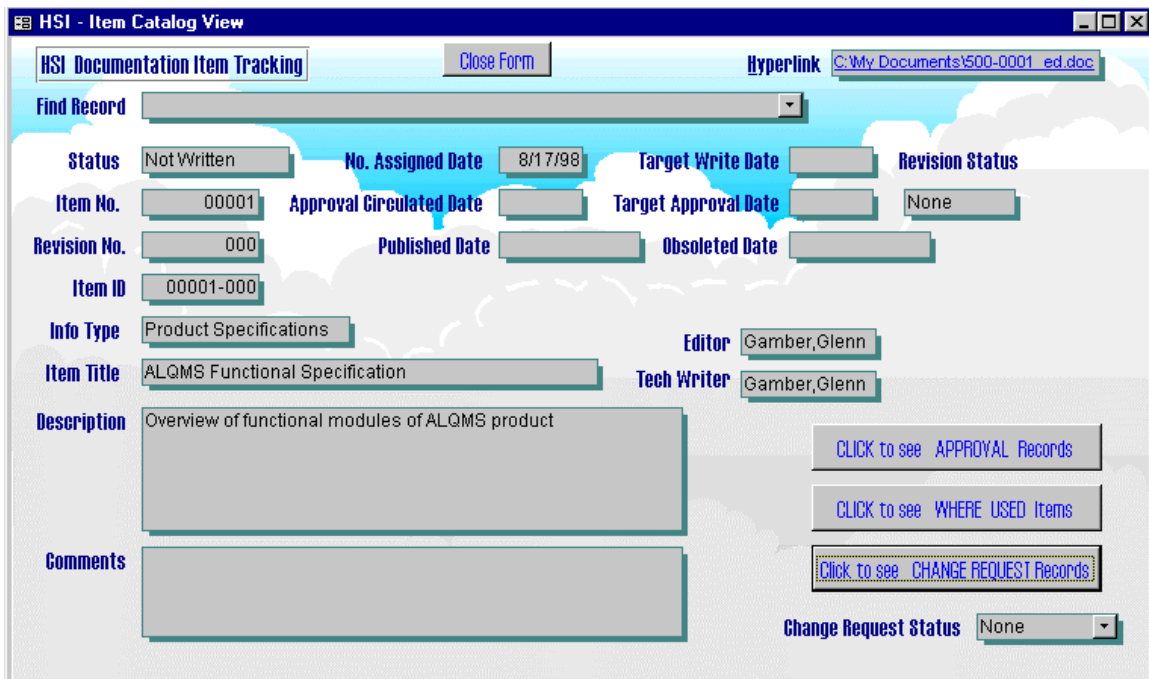


Figure 20. Approval Record Summary

Item ID	Item Title	Responsible Dept	Writer/Revisor	Approving Dept	Approver
00001-000	ALQMS Functional Specification	Product Marketing	Jackson, Doty	Technical Development	Dales, Dana
00001-000	ALQMS Functional Specification			Product Marketing	Jackson, Doty
00001-000	ALQMS Functional Specification			Executive	Jackson, David
00001-000	ALQMS Functional Specification			Outside Consultant	Eberhardy, Jeanette
00002-000	ALQMS Business Concepts Descrip	Product Marketing	Jackson, Doty	Product Marketing	Jackson, Doty
00002-000	ALQMS Business Concepts Descrip	Outside Consultant	Eberhardy, Jeanette	Outside Consultant	Eberhardy, Jeanette
00002-000	ALQMS Business Concepts Descrip			Technical Development	Yao, Jack
00003-000	TQMS Business Concepts Descripti	Product Marketing	Jackson, Doty	Product Marketing	Jackson, Doty
00003-000	TQMS Business Concepts Descripti			Technical Development	Dales, Dana
00003-000	TQMS Business Concepts Descripti			Executive	Jackson, David
00004-000	All Products Functional Specification	Product Marketing	Jackson, Doty	Product Marketing	Jackson, Doty
00004-000	All Products Functional Specification			Technical Development	Dales, Dana
00004-000	All Products Functional Specification			Executive	Jackson, David

Record: 1 of 50
