Managed Alerts (Alert Assignment and Tracking)

This document with analysis of current Metric Insights functionality and specification for new functionality “Managed Alerts". The all information (questions, answers, media files and etc) used for current solution you can find at the end of this document.

This document may be amended close to feedbacks or requirements after presentation.

About

Requesters

Philips OEM, TBA, Boston Scientific

Purpose & Goals

The all changes described in this document are based on the information from question list, media files and provided documentation.
To be Sure in the future success we have to present/test this solution with real customers.
But in any case this document can be used for DISCUSSIONS / MVP / EARLY IMPLEMENTATION.

This solutions directed to meet the needs of customers: Philips OEM, TBA, Boston Scientific etc.
List of the features that were defined:

- Status to an alerts system: new, closed + (N) number of custom statuses: (acknowledged, action taken, exception, ignore, etc.)
- Tracking comments/actions on alerts.
- Tracking the age of an alert where no action was taken.
- Delaying to the alert visibility for specific users or user groups (i.e. alert user group A first, then user group B 3 hours later).
- Security (User A is only allowed to see Product Family A) - Maybe for second iteration of implementation.

To make more simple access to the new feature we have to change some part of current functionality (Subscription tab in Alert Rule editor).
New functionality offered considering the real possibilities of the current implementation of the project.
In the project we have many corners that we can simplify or make better, but to meet of needs our customers this feature is proposed in consistency to current functionality.

Table of Content

Notifications & Security Issues

Notifications

The main idea of this feature is collaboration between users with different roles. Managers can check the very important Alert, assign this Alert with comment to the Workers on the factory.
The second important part of the feature is Alert Board where Manager can check all important alerts (statuses and how long Alert without changes).
Every time when something changed we will send notification to all subscribers.
But if User do not want send notifications about status/comment or something else to all subscribers he can uncheck “Send to all subscribers”.

1. Send notification to the all subscribed users when: Status changed, Assignee Changed, Ticket Unassigned, Added Comment.
2. When Alert generated it is sent to all Recipients (and die)
3. For Alert Flow we create Clone of Alert - Ticket.
4. All information: comments, statusses, settings and etc works with ticket.

Security(Maybe for next iteration if needed for customers)

5. Admin can define access to specific statuses or messages in collaboration section.
6. One specific role can see only comments from other specific Role.
   Example: Manager assign ticket to another manager with comment. This comment will be visible for managers in the collaboration section on the viewer of element. Workers will not see this comment in the collaboration section.

Vocabulary

1. **GLOBAL ELEMENT** - This control/element can be used different places.

2. **ALERT FLOW** - The way of ticket (Fake Alert) included STATUSSES and Roles. Admin can create “Alert flow“ and assign this flow in the Alert Rule to Alerts. Alert flow can be changed/renamed/deleted.

3. **DEFAULT ALERT FLOW** - It is array with STATUSSES (“New”, “To do”, “Close”)and Roles. cannot be changed/renamed/deleted.

4. **STATUS** - It is the item of the Alert Flow. Alert Status can be changed/renamed/deleted. Admin can create any number of STATUSSES. Also it is variable with setting for the alert that were moved to this status in the Alert Flow.

5. **DEFAULT STATUS** - It is the item of the Alert Flow that can not be changed/renamed/deleted.

6. **ROLE** - It is workflow for USER or USER GROUPS who will have access to the some STATUS(SES) in ALERT FLOW.

7. **TICKET** - It is item that will be imitate alert in the alert flow and show on the dashboard. This item can have settings (Assigne and Timer). All subscribes notified about new ticket but thay can unsubscribe in the future.

8. **TICKET (UNASSIGNED)** - If ticket is unassigned all users who subscribes to the alert will see TICKET NOTIFICATIONS.

9. **TICKET (ASSIGNED)** - In the Assigned ticket user can uncheck checkbox “Send to all subscribers” and TICKET NOTIFICATIONS will be send only to Assignee.

10. **TICKET NOTIFICATIONS** - it is notification email/sms etc. If user do not unsubscribed from the Alert he will have notification about status changes, comments, assignee etc**.**
    Info in notification: (status, when, who, comment etc).

11. **ALERT BOARD** - It is tab on the homepage where users can choose Alert Flow and check the STATUS of every TICKET. Every TICKET can be moved to another STATUS by drag&drop.

12. **ASSIGNEE** - The USER who included in some ROLE who can see TICKET, this USER can assign ticket to another USER and move it to another STATUS.

13. **USE CASE** - A use case is a written description of how users will perform tasks.
    It outlines, from a user’s point of view, a system’s behavior as it responds to a request. Each use case is represented as a sequence of simple steps, beginning with a user's goal and ending when that goal is fulfilled.

14. **ACTOR** - anyone or anything that performs a behavior (who is using the system)

15. **TOUR:**
    a. **Btn: NEXT** **-** Provide some actions and change the tooltip to the next.

    b. **Btn: SKIP TOUR** **-** Hide tooltip without any actions. Tour do not FINISHED
    Next time tour will started from 1-st step.

    c. **Btn: FINISH** - This button is appear on the last step of the tour.
    After click current tour is FINISHED.

    d. **State: FINISHED** **-** Tour is FINISHED. This tour will be not proposed to the User when he will return to page with this tour.

    e. **State: NOT FINISHED** **-** Example: If tour is NOT FINISHED appear tooltip with text:
    “You are not finished tour “How create Alert flow”
    Do you want to see this tour again?”

Buttons: Start tour, Do not show again.

f. **Btn: DO NOT SHOW AGAIN -** This button appears in the reminder tooltips. After click the tour is FINISHED.

g. **TOUR VALIDATION:** **-** If user click to the "NEXT" button but focussed controls is not filled/checked. The next step is not occurs.
hint:"You can not go to the next step, please [described action]"

UX Solutions

About Use Cases

Use cases add value because they help explain how the system should behave and in the process, they also help brainstorm what could go wrong.
They provide a list of goals and this list can be used to establish the cost and complexity of the system. Project teams can then negotiate which functions become requirements and are built.

Also we will use Use Cases for Usability Testing on Prototypes.

Basic Use Cases (In my opinion we should describe more cases. Need more time.)

1. Use Case | Admin : Create Alert rule for Managers and Workers.	
Actor	Admin
Use Case Overview	The MI system updated to the new version and Admin has a new task. He knows this system well, but he do not know new functionality. Task: Admin must create new Alert rule for sending alerts to the Managers who will assign these alerts to workers from the factories in another country. Managers will check the status of the alert and when alert will be resolved manager will change the status to the "closed".
Subject Area	Homepage or Alerts Flow editor
Trigger	New Alert Rules has been created.

Basic Flow		
Description: Admin know his task but he do not know where and how he can add flow to the alert. Hi open top menu and create new Alert Rule.		
Steps:		
Step #	Actor does	System respond
1	The "KPI Alert / Daily Sales: Less than 1" Has been created by admin few seccond ago and this Alert Rule just loaded.	Tooltip (tour) appears. Text: "Hi, you have new functionality here! With new functionality you can create Alert Flow and workflows for specific Roles of Users or User Groups in this flow. You can create your custom Alert Flow or choose default Alerts Flow for this Alert rule on the "Flows&Subscriptions" tab." Buttons: NEXT, SKIP TOUR.
2	Click to the "NEXT"	Tab changed to the "Flow&Subscription" tab. The first control on the page is dropdown for choosing Alert

		Flow. Tooltip (tour) appears near dropdown. Text: “In this Dropdown you can choose default Alert Flow for current Alert Rule. Default rule: (Statusses: New, Closed. Roles: MANAGERS, WORKERS). If Alert Flow is chosen, you have access to the Roles from the Alert Flow in the popup “Select Recipients” for this Alert Rule.” Buttons: NEXT, SKIP TOUR.
3	Click to the “NEXT”	Tooltip (tour) appears near Grid “Alert Flows”. Text: “You are can`t delete or edit default Alert Flow but you can create your own Alert Flow.” Buttons: NEXT, SKIP TOUR
4.	Click to the “Add new Alert Flow” or “Next” button.	Appears “New Alert Flow” popup. Tooltip (tour) appears near input with “Alert flow name”. Text: “Please, give the name for your Alerts Flow” Buttons: NEXT, SKIP TOUR. Note: when NAME is filled the next control will be active.
5	Click to the “NEXT”	Tooltip (tour) appears near button “Create new status”. Text: “Please, create few STATUSSES and few ROLES for the recipients in the Alert Rule” Buttons: NEXT, SKIP TOUR.
6	Click to the next button and create few statusses with notifications delay for WORKERS in the first STATUS.	When more than 2 statuses were created, the control with Roles has been activated.
7	Admin create 2 roles. MANAGERS and WORKERS.	When second ROLE has been created, appear Tooltip (tour) near SAVE button. Text: “Almost done! We have to define recipients and Alert Rule will be completed!” Buttons: NEXT, SKIP TOUR
8	Click to the “NEXT”	The “New Alert Flow” popup was saved & closed. Tooltip (tour) appears near grid with recipients. Text: “Please, add new recipients to this Rule and choose roles for them” Buttons: NEXT, SKIP TOUR
9	Click to the “NEXT” or “Add recipients”	The “Select Recipients for Alerts” popup is opened.
10	Admin add few users with MANAGER role and few with WORKER role	When for both ROLES chosen at least 1 user the save button is Active. Also appears tooltip (tour). Text: “Please, save the changes and your Alert Rule will be done!” Buttons: NEXT, SKIP TOUR
11	Click to the “NEXT” or “Save”	The “Select Recipients for Alerts” popup is closing. Tooltip (tour) appears near button “Send test”. Text: “Well Done! Your Alert Rule with it`s own Flow has been created. Click to this button and test notification will be send. You can check status of the Alerts on homepage in the “Alert Flow” Tab. Buttons: CHECK HOMEPAGE, FINISH.

Alternative Flow A1		
Description: Admin know his task but he do not know where and how he can add flow to the alert. Admin see the new icons (Alerts Board) next to the NEWS icon.		
Steps:		
Step #	Actor does	System respond
1	Admin click to the “Alert Board” icon	The “Alert Board” is opened with default Alert Flow. This board without data. Hint on the board: “You do not have any Alert Rules with defined Alert Flows yet. If you want to check statusses of generated Alert, please choose Alert Flow for Alert Rules: KPI Alert [link], Global Alert [link], Report Alerts [link] or create New Alert Rule”.
2	User click to the KPI Alert [link]	The KPI Alerts editor is loaded [/editor/kpialertrule]
3	User click to some KPI Alert in the Grid	Starting “Basic Flow”

Alternative Flow A2		
Description: Admin know his task but he do not know where and how he can add flow to the alert. Admin go to the top menu and serf it. He see the new item “Alert Flows” He click to the “Alert Flows” item and go to the new editor “editor/alertsflow”. This editor looks like a new tab next to the “Report Alerts” tab.		
Steps:		
Step #	Actor does	System respond
1	Click to the Top menu -> New -> Alert Flow	“Alerts flow” editor is opened. Appears “New Alert Flow” popup. Tooltip (tour) appears near input with “Alert flow name”. Text: “Please, give the name for your Alerts Flow” Buttons: NEXT, SKIP TOUR.
2	Admin fill the input with name and click NEXT	Hidden validation (described in the “New Alert Flow” popup). Tooltip (tour) appears near “Add new status” button. Text: “Please, create the new statusses of the Alert in current flow. You can add specific setting to every status and after you can use this status for specific Role. Let`s create Few statuses” Buttons: NEXT, SKIP TOUR
3	Click to the NEXT button and create few statusses	When more than 2 statuses were created, the control with Roles has been activated. Appears tooltip near Roles with the text: “Now, let`s create few roles for the recipients in the Alert Rule”. Buttons: NEXT, SKIP TOUR.
4	Admin click to the “NEXT” button and create roles MANAGERS and WORKERS.	When second ROLE has been created. Tooltip (tour) appears near SAVE button. Text: “Almost done! Save the changes and you will have access to your custom Alert Flow in the any of Alert Rules. Buttons: FINISH
5	Click to the FINISH	The new Alert Flow is saved and “New Alert Flow” popup is closed.

2. Use Case | Role 1 (MANAGERS): Manager has received the new Alert.	
Actor	MANAGER
Use Case Overview	Manager has received the new Alert and he Check the information resolve the problem.
Subject Area	Email
Trigger	Click to the name of element or to the alert in email.

Basic Flow		
Description: Manager has received the new Alert. He check the information and he want resolve this problem ASAP. Manager want show this alert to somebody of WORKERS on the factory.		
Steps:		
Step #	Actor does	System respond
1	Manager clicks to the element name in the Email (Alert)	The Metric Insights opened in the browser window on the element viewer. Near alert icon on the chart appear Tooltip With Alert Information.
2	Manager take decision and click to the edit icon	Appears Alert Status Popup
3	change status of Alert to the: “To do” (Alert with this status visible for all WORKERS). Also he added comment “The mug of beer to someone who will resolve it first!”. Click to the “SAVE” button	All WORKERS receive the new TICKET NOTIFICATIONS + comment.

Alternative Flow M1		
Description: The Alerts Board is opened and MANAGER checking the all information about current Alerts. At this moment he takes new Alert with status “resolve”.		
Steps:		
Step #	Actor does	System respond
1	MANAGER has received the TICKET NOTIFICATIONS and he check this notification. He read the comment “Done! I am waiting my beer.” He click to the link.	The element viewer is opened and scrolled to the comment under Alert in the collaboration section.
2	MANAGER click to the edit icon	Appears Alert Status Popup
3	Manager change the status of the TICKET to the “CLOSE”. Also he add comment. The checkbox “Send to all subscribers” is checked. Click to the save button.	Subscribers get TICKET NOTIFICATION With next information: (status, when, who)

Alternative Flow M2		
Description: The Alerts Board is opened and MANAGER checking the all information about current Alerts. At this moment he takes new Alert with status “resolve”.		
Steps:		
Step #	Actor does	System respond
1	MANAGER check the ticket on the Alert Board. He read the comment “Done! I am waiting my beer.” Manager trust the worker and drag and drop this ticket to the “CLOSE” status.	Appears Alert Status Popup
2	Manager add comment, uncheck the check box and click “SAVE”	Only ASSIGNEE get TICKET NOTIFICATION about new STATUS.

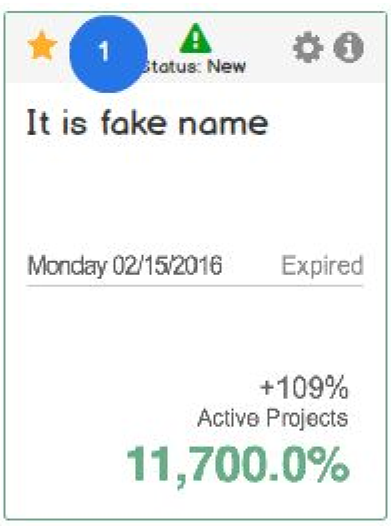
3. Use Case | Role 2 (WORKERS): WORKER has received the Alert.	
Actor	WORKER
Use Case Overview	WORKER has received the Alert with status “to do”.
Subject Area	Element viewer and Homepage
Trigger	Click to the name of element in the email.

Basic Flow		
Description: Worker has received the Alert with “to do” status and comment from the Manager “The mug of beer to someone who will resolve it first!”. This Alert is not Assigned to someone that is why it s can be taken by any of WORKERS. Worker want to resolve this problem, he want to be respected.		
Steps:		
Step #	Actor does	System respond
1	Worker check the TICKET NOTIFICATION on the email with comment from the manager. Worker click to the comment from Manager in the TICKET NOTIFICATION.	The element viewer is opened and scrolled to the comment under Alert in the collaboration section. Note: In the collaboration section near alert he see the history of statusses and comments with attached files (if somebody have attached files to the comments).
2	Worker check the information, and click to the edit icon.	Appears Alert Status Popup
3	Worker change the assignee to himself and click to the “SAVE” button.	All subscribers take TICKET NOTIFICATION

Alternative Flow W1		
Description: The problem is resolved and Worker want to change status of the ticket and notify manager about changes.		
Steps:		
Step #	Actor does	System respond
1	Worker goes to the homepage and clicks to the Alert Board icon.	The Alert Board has been opened.
2	Worker drag & drop ticket to next column (next status)	Appears Alert Status Popup
3	Worker change the assign to the manager and add comment “Done! I am waiting my beer.” Also worker uncheck the checkbox “Send to all subscribers”. Click to the “SAVE” button.	Manager take the TICKET NOTIFICATION.

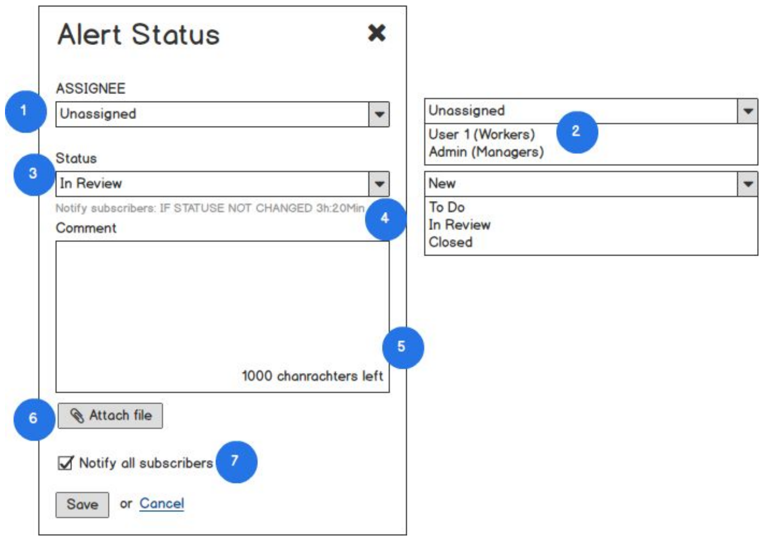
Global Elements:

Global element - Elements that will be used in the many places.

“Tile” Homepage	
	1. Status in the Tile. - Show status of the Alert near Alert icon.

“Alert Information” Tooltip	
	It`s current Tooltip that is appear after click to the Alert icon on the chart. 1. Header with alert info (Without changes) 2.ASSIGNEE - NEW ticket is unassigned. Every ticket can be assigned with comment from the user to another User. New Assignee will be notified about this changes. 3. STATUS - Status of the Alert/Ticket. 4. Edit - After click to this icon appear "Alert Status" Popup. 5. Add comment link - current behaviour

“Alert Status” Popup



Big size: http://take.ms/YveM9

1.ASSIGNEE - NEW ticket is unassigned. Every ticket can be assigned with comment from the user to another User. New Assignee will be notified about this changes.

2. Near Username of every ASSIGNEE we show Role of this user.

3. STATUS - Status of the Alert/Ticket.

4. If STATUS has settings we show this setting under dropdown with status. (onChange event)

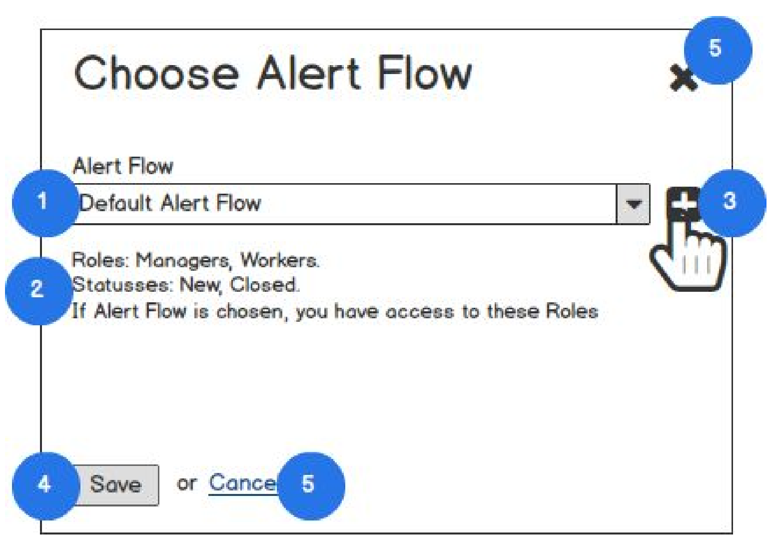
5. Text area for comment

6. Input for file attachment

7. Checkbox (checked by default): Send notification to all subscribed

(Note: Comment and status will be send like TICKET NOTIFICATION and will be posted in collaboration section under alert.)

“Choose Aler Flow” Popup



1. Dropdown with: Alert flows. "Default Alert Flow" alway chosen by default.

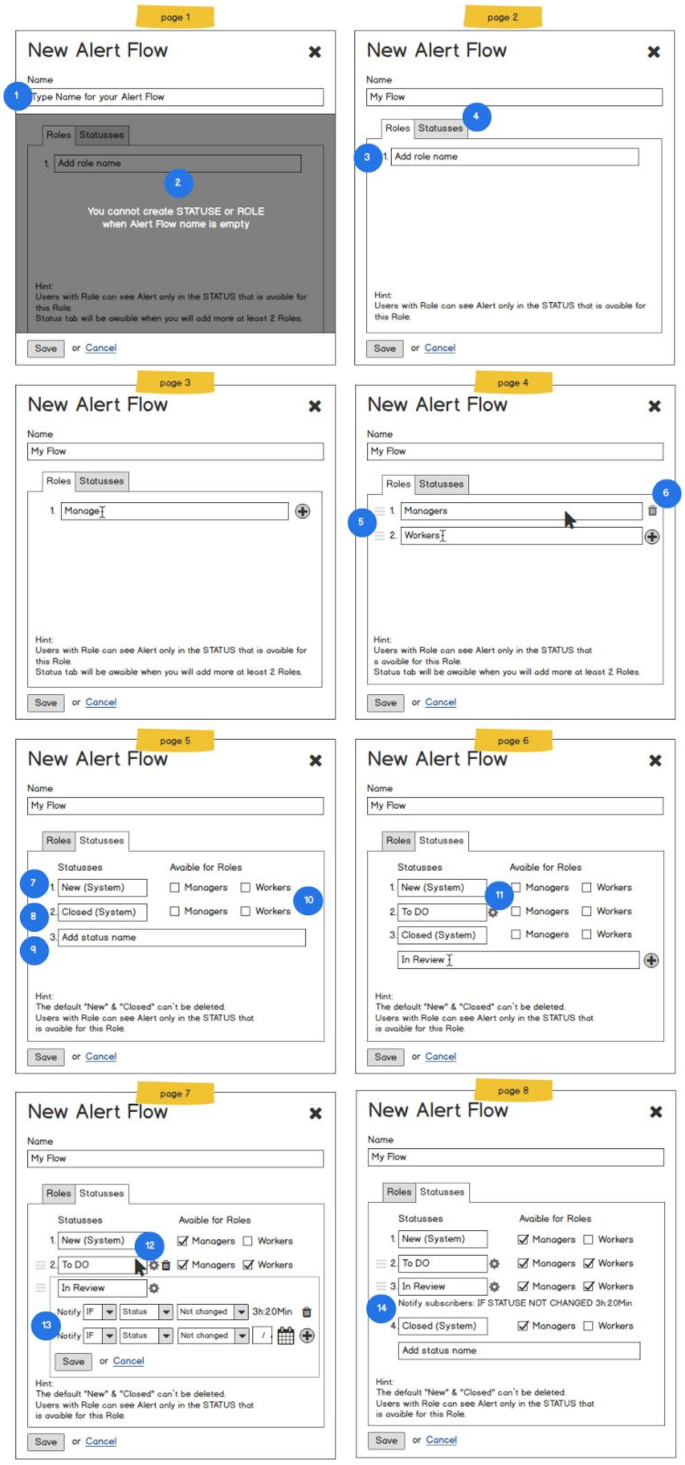
2.Information about chosen dropdown. This information will be updated when user will change Alert Flow in the Dropdown.

3. "Plus" button - This button opens “New Alert Flow” Popup.

4. "Save" button - Apply chosen Alert Flow for Alert Rule.

5. "Close" and "cancel" buttons - discard the changes and close this window

“New Alert Flow” Popup



Big size: http://take.ms/xiDJh

About:
This Popup can be saved only if Roles and Status are added and statusses assigned to Roles.

If user try to SAVE "Alert Flow" and some field is empty:
“Sorry, you are not: [List with instruction what should done.]. Your Alert Flow cannot be saved.”

Buttons: SAVE - Save new Alert flow when: Name filled, Roles ≥ 2, Roles with statusses.

If user try to CLOSE Alert Flow and something not filled appears confirmation popup with text: “Sorry, you are not: [List with instruction what should done.]. Your Alert Flow will be lost”
Buttons: “Close anyway” or cancel

1. Input "Name"

2. Tabs "Roles"&"Statusses" - disabled when "Name" is empty.
Logic: Input [removed focus] - > validation -> IF successful -> "Roles" tab is active.

3. input "Add role name" - Can be saved by “Enter” or "Plus" icon.

4. "Statusses" tab disabled if Roles tab empty.

5. Drag&Drop is active if created at least 2 roles.

6. Remove role

7. Status "New" - this status can not be deleted and moved.
Always first.

8. Status "Closed" - this status can not be deleted and moved.
Always last.

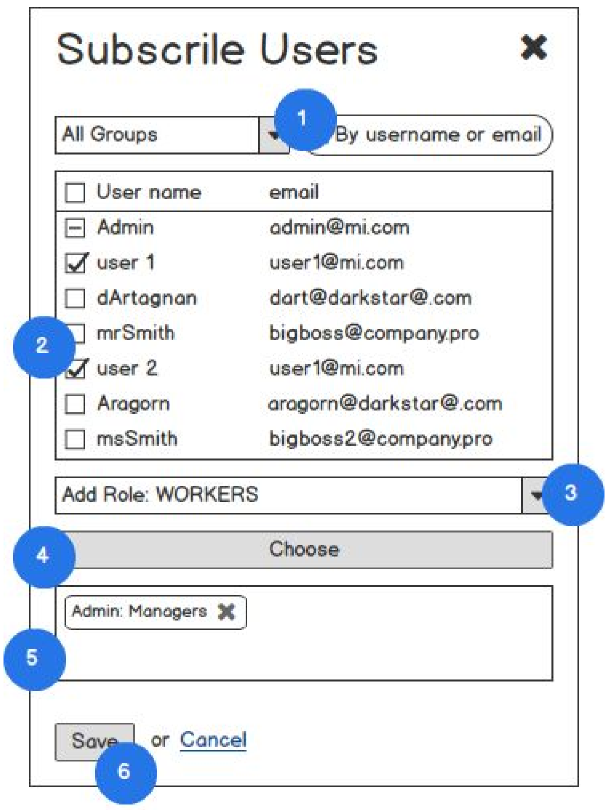
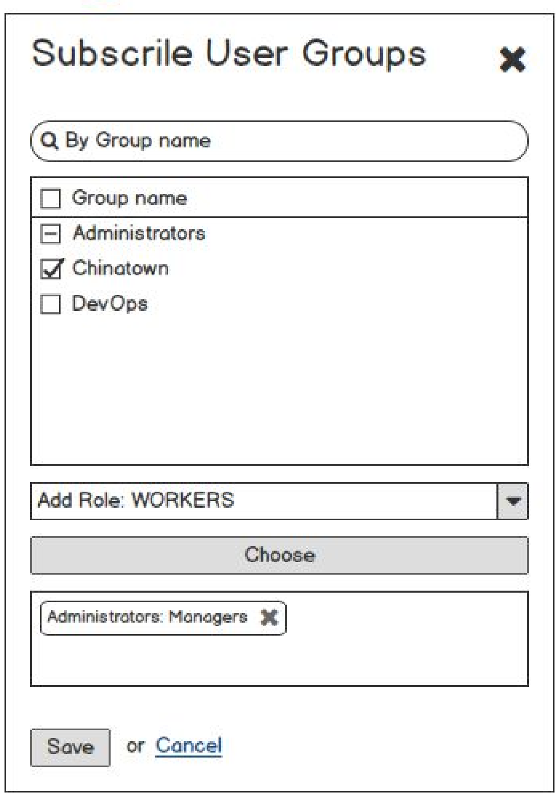
9. "Add status name" - New STATUS can be saved by “Enter” key or “Plus” icon.

10. Roles - Role wll have access to Alert in the checked statusses.

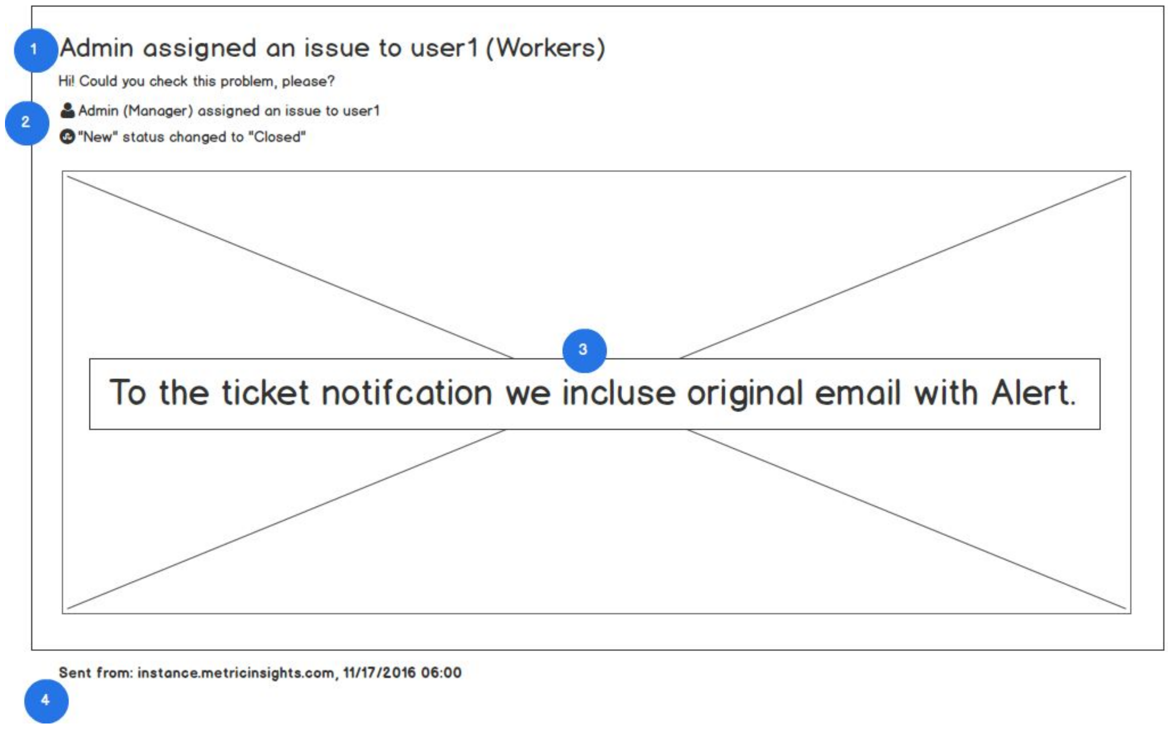
11. "Gear" icon - User can add settings (time delay and etc) to the custom statusses.

12. "Delete" icon - show when on mouse over input with status.

	13. User can create his own setting for Alert that will be in this status. 14. When settings are saved, tooltip will close and rule appear in input with status.

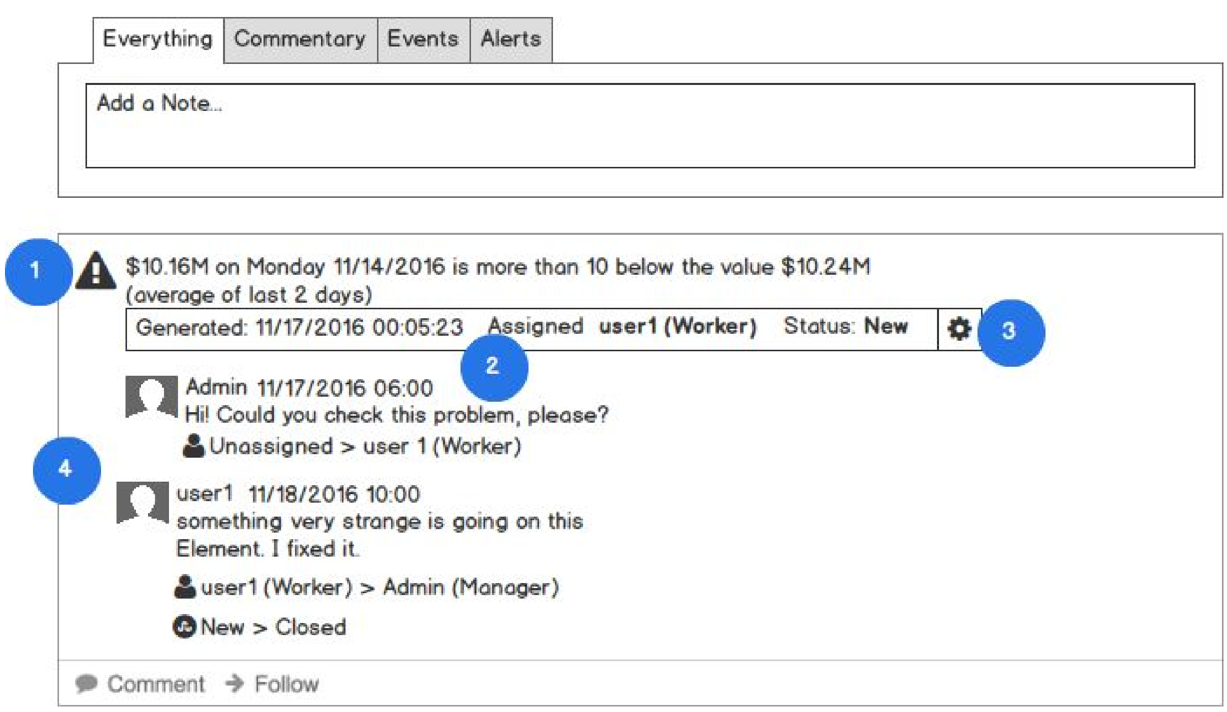
“Subscribe Users” and “Subscribe User Groups” Popups	
 	1. Filters -onchange event should be used. When user started typing or when group has been chosen in the dropdown - users should be filtered. 2. User check the recipients 3. Dropdown with Role for chosen recipients 4. After click to the "Choose" button selected users will be added to the block #5 by tags. 5. Every recipient present by tab with User name and Role. User can be removed from this block (click to the icon). 6. "Save" button will apply the changes and include recipients to the grid.

“TICKET NOTIFICATION”



1. Title with information:
a) Who change the status or assignee.
b) Current status or assignee.
c) This title is clickable and linked to the collaboration section on the viewer.
2. Information about changes - the same view like in the collaboration section.
3. Block with original Alert
4. Information about instance and when this notification was sent.

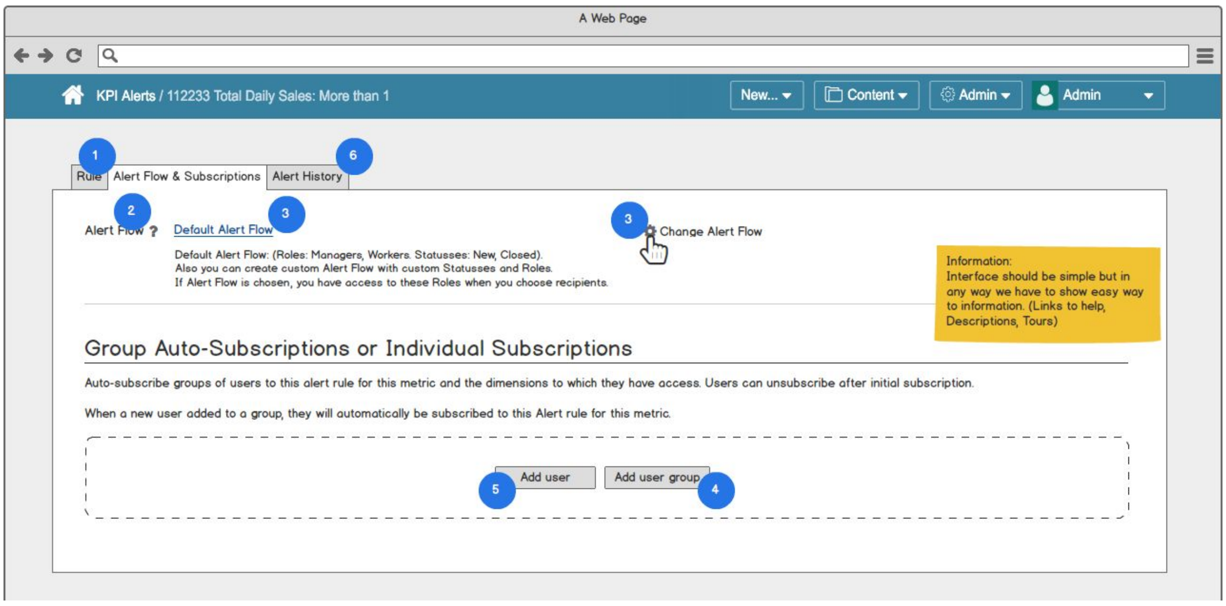
“Collaboration”



1. Our current Alert + additional information.
2. "Generated" - When it was generated,
"Assigned" - Current Assignee,
"Status" - Current status
3. "Gear" icon - open "Alert Status" Popup.
4. When something changed in the "Alert Status" Popup, this information add to collaboration section. Information: Who change status, When change status, Who change assignee, Who is assignee was, Who now assignee, old and new statusses.

Alert Rule (Changes)

“Alert Flow & Subscription” Tab



One new grid with recipients instead (Group Auto-Subscriptions and Individual Subscriptions).

1. Change Name: "Subscriptions" -> "Alert Flow & Subscriptions"

2. Question mark - External link to "About Alert Flow" page.

3. "Default Alert flow", Gear icon "Change Alert Flow": open "Choose Alert Flow" Popup.

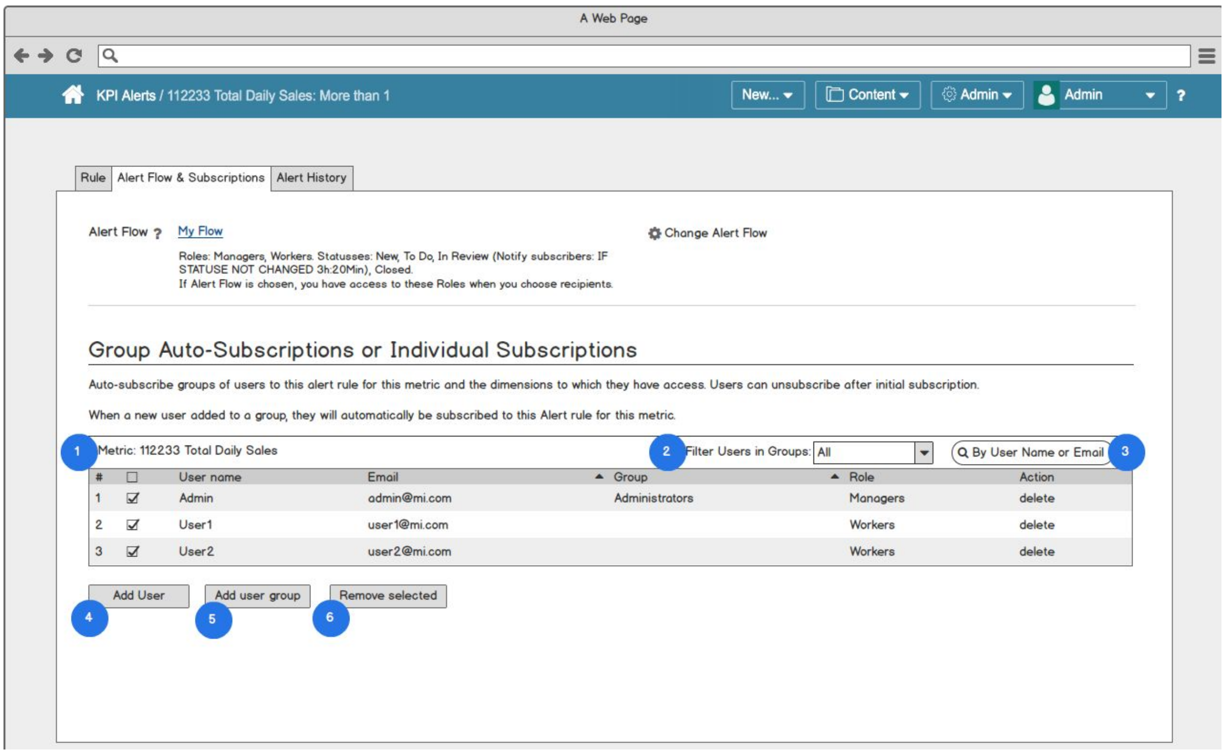
4. "Add user" button - open "Subscribe Users" popup.

5. "Add user groups" button - open "Subscribe User Groups" popup.

6. Alert History - open "Alert History" tab with changes in the grid

Big image: http://take.ms/aRxp8

“Alert Flow & Subscription” Tab (Changed Alert Flow & Added Recipients)



About - When Admin subscribes some user group the all users from this group will receive Alert.
If new user will be added to the group he will be subscribed automatically.
User can unsubscribe from the subscription.

1. Name of the elements. In another situation this name will be changed to dropdown.

2. Filers by User Groups

3. Filter by name or Email.
The one of the most important rules in usability it's system response.
(Response of the system will be shown via filtered Users when User is typing). - start event when user is typing.

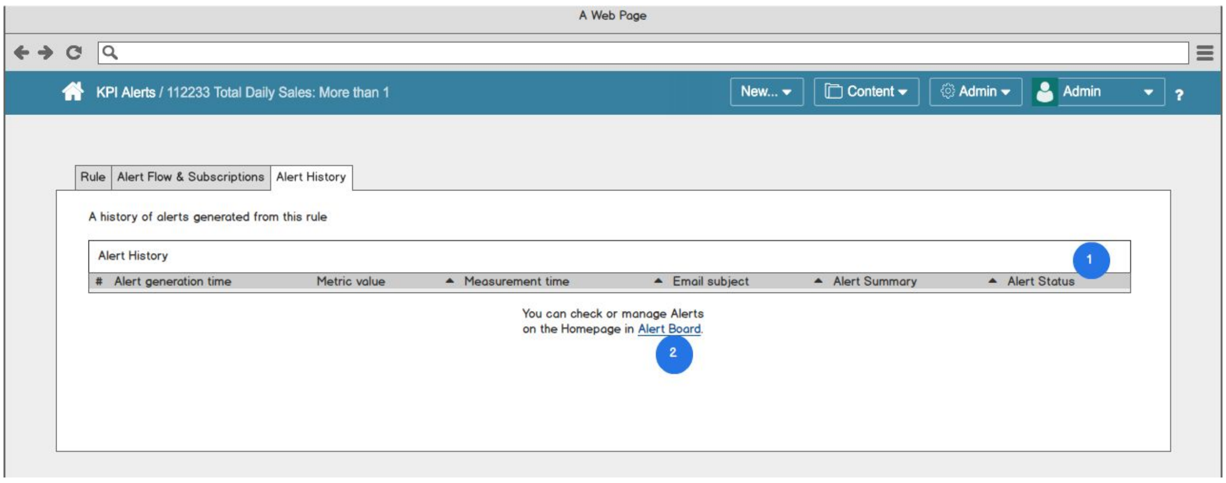
4. Open "Subscribe Users" popup

5. Open "Subscribe User Groups"

6. “Remove selected” button will be active only when users selected. This button unsubscribe selected recipients.

Big image: http://take.ms/yvrdl

“Alert History” Tab

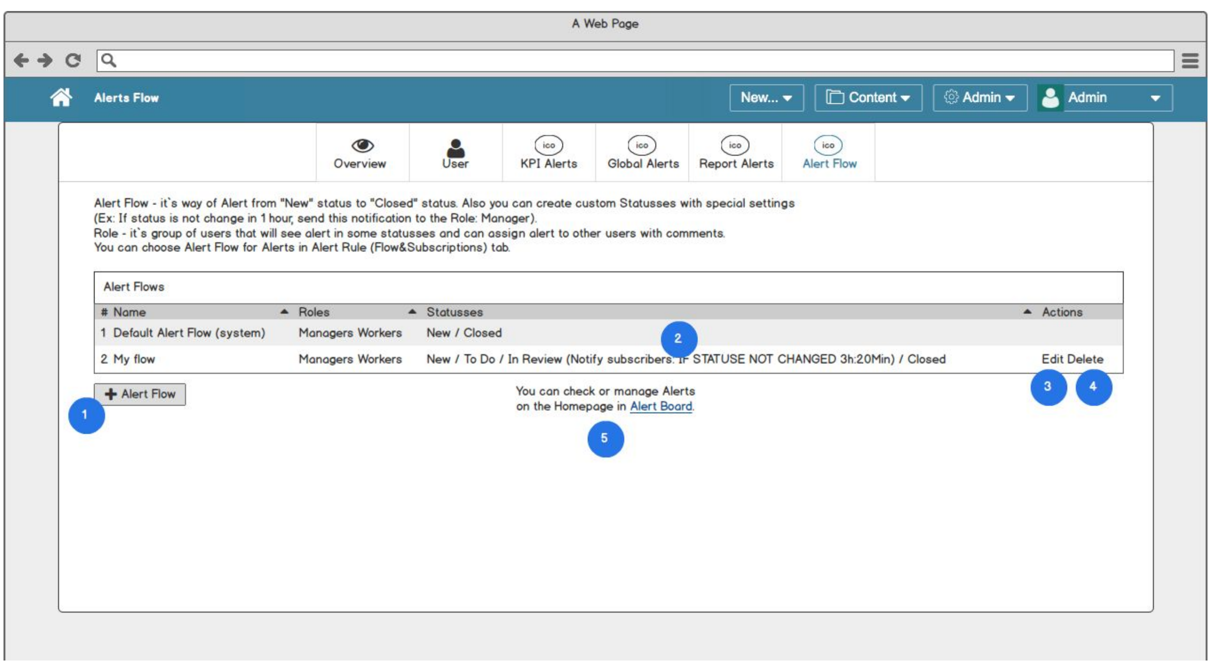


1. "Alert Status" - New column in the Grid.

2. Link to the "Alert Board" - This link redirect user to the homepage and open "Alert Board"

Big image: http://take.ms/5fAoZ

Alerts Flow Editor (New Editor)



1. Open "New Alert Flow" popup

2. Custom Statusses - if settings added to the statusses we show these settings near status.

3. Open "Edit Alert Flow" popup - almost the same with the "New Alert Flow".

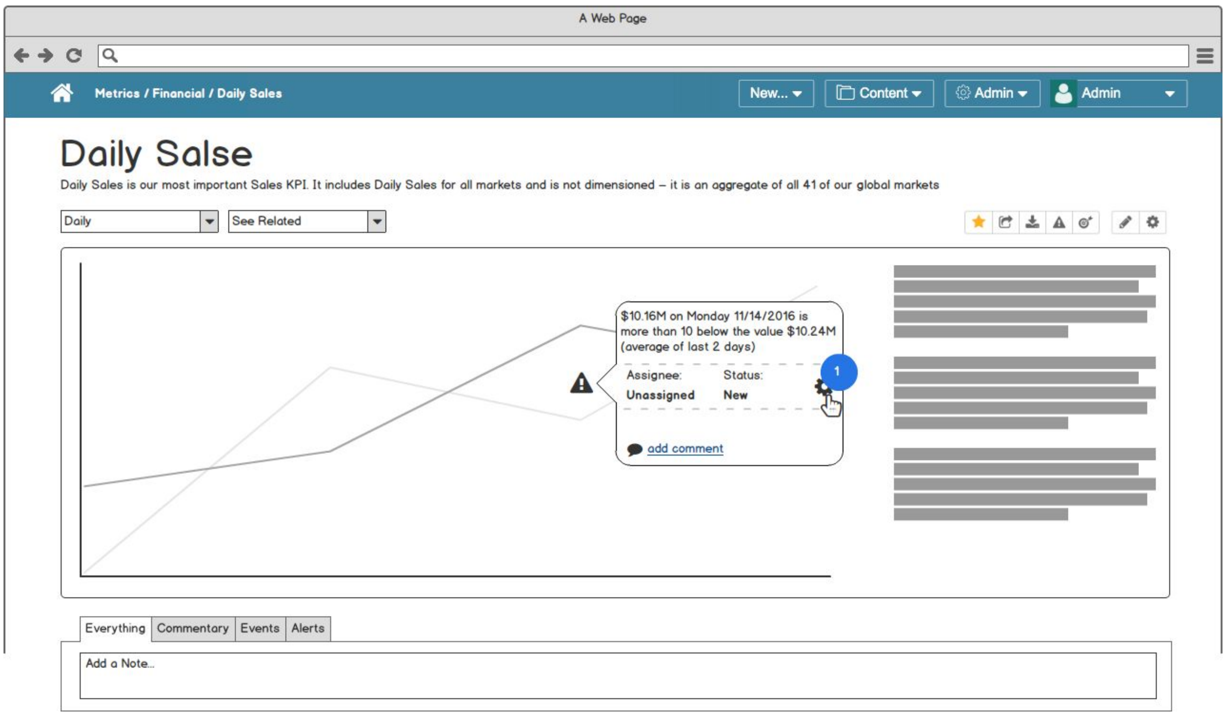
4. Delete custom Alert Flow

5. Redirect User to the homepage with opened Aler Flow Tab.

Big image: http://take.ms/geUOK

Element Viewer Changes

“Highcharts” Alert Information Tooltip - Open when page load



Changes in functionality:

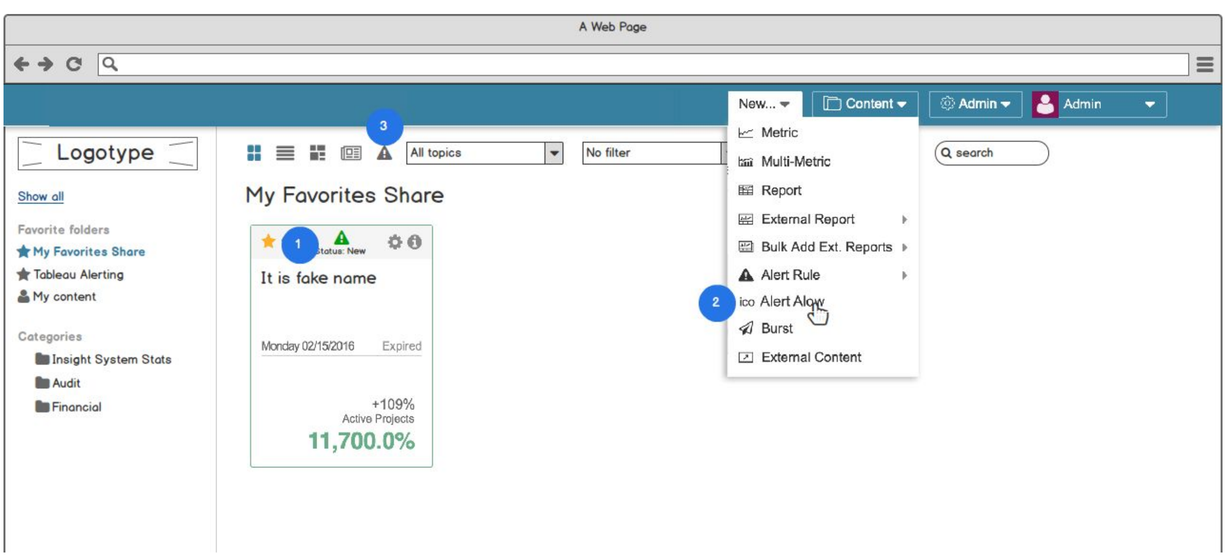
[Alert information tooltip](#)

[Collaboration section](#)

1. Open [Alert Status Popup](#)

Homepage

“Tile view and Top Menu”



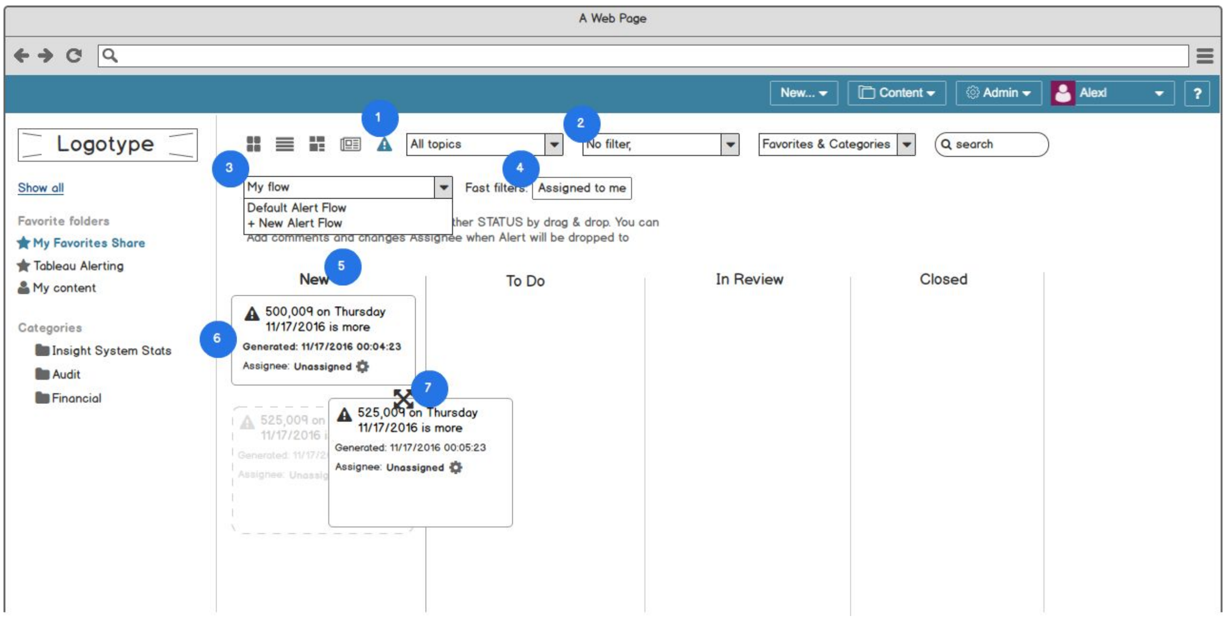
1. [Status in the tile](#). - Show status of the alert near alert icon.

2. "Alert Flow" editor - Redirect user to the ["Alert FLow" Editor](#) with opened ["New Alert Flow"](#) popup.

3. "Alert Board" tab.

Big image: http://take.ms/wByRm

“Alert Board”



1. Alert Board Tab

2. List of new items for filter:
Recent alerts
Alerts status:
New
Closed
All statuses visible for user…
Good alerts
Bad alerts

3. Dropdown:
a) List of available Alert Flows.
b) + New Alert Flow - open "New Alert Flow" popup

4. "Assigned to me" - When this button is pressed on the board visible only tickets of current user.

5. Statusses from chosen Alert Flow.

6. Ticket - default Alert title, when generated, Assignee.

7. Ticket can be moved to the another column by drag & drop.
When ticket will be dropped to the another column will appear "Alert Status" popup.

Big image: http://take.ms/5eU8n