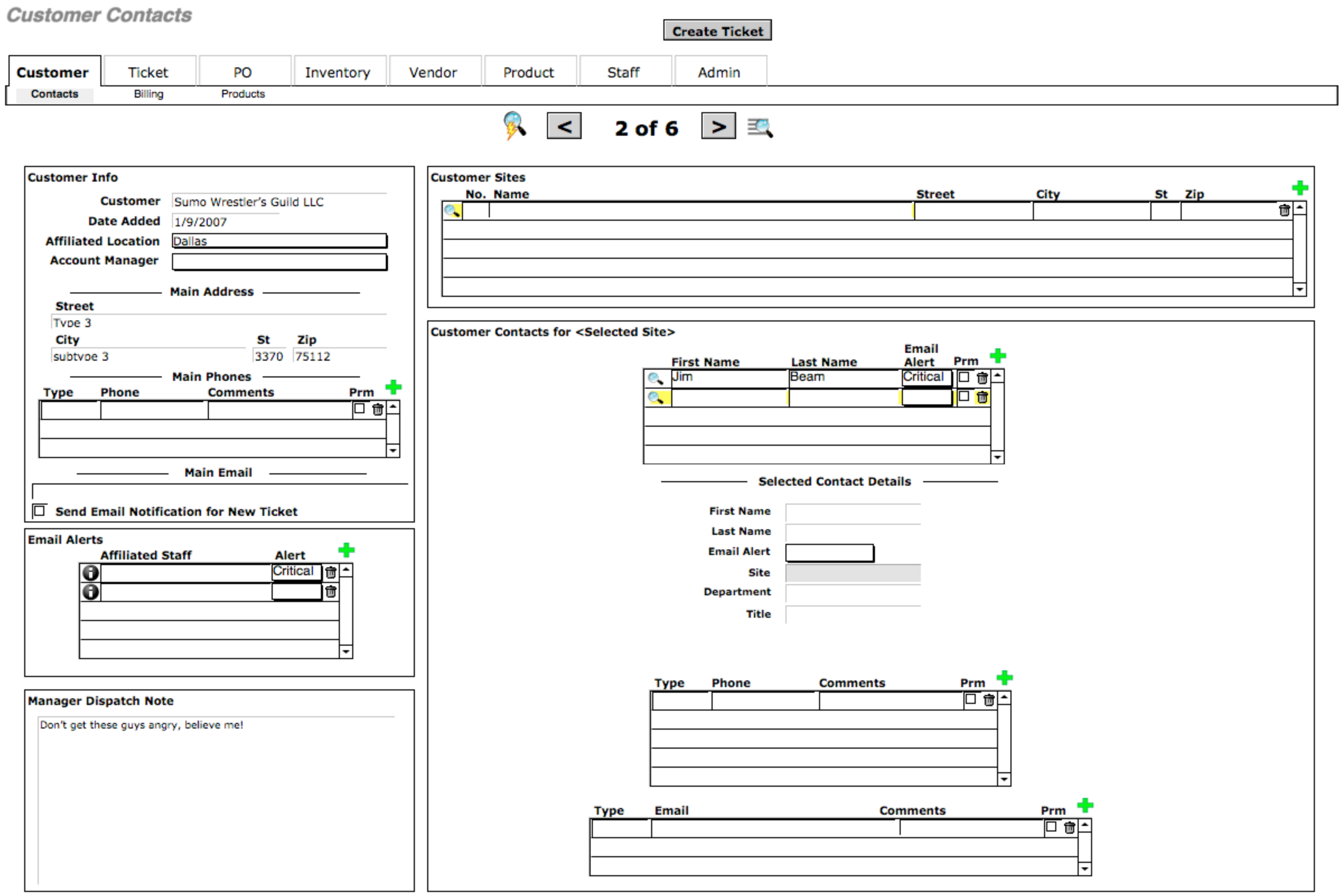
Wire Frame Report

Customer Contacts nav



New Customer From Menu only, runs a script which first runs a duplicate check, then adds customer. Also adds a default site, which cannot be deleted unless the customer is deleted. Also imports customer labor rate records from the labor rate lookup table; rates can then be edited.

Main address actually fills in site no. 1

email alerts creates a join record between this customer and an affiliated staff person.

email alert info hover over it to get the email address

add email alert adds an email join record, lands the cursor in the aff staff field, which is a drop down menu with type ahead turned on; once a match is made, it auto enters their zzk; auto-enters "All" for the alert.

delete email alert pops a modal dialog confirming delete, then deletes the record

Wire Frame Report

Customer Contacts nav

Customer sites/no. — auto-enters a sequential number for each new site, doesn't skip; not an enterable field. If a site is deleted, it does NOT try to resequence the numbers. Once a site is deleted, NEVER resequence the numbers.

Customer sites/add — adds a new customer site record, selects it, and ends with the cursor in the street field; auto-enters "TX" as the state

customer sites/delete — checks to see if there are tickets or what-not attached to it, and aborts with a modal warning if so. This can't be overcome outside of developer mode in a utility layout. If no other attachments, pops a modal dialog asking to confirm delete, then deletes record. Also won't allow deletion of the last site.

customer sites/select — sets the selected site to hilited background, and sets it as the chosen site under customer contacts.

customer contacts/ site — a value list of all the customer sites, along with the word "all" at the top. "all" shows all contacts regardless of site affiliation. choosing a site filters the list of contacts to only contacts for that site. Once changed, the selected contact changes to the primary contact for that site. It shows the No., the Street, and the City

Jan 16, 2007 Rudy said, the all option is not needed.

primary — in any portal, deselects the previous primary, and checks the new one; for contacts, if "all" is selected, makes that contact the primary for his OWN site.

add contact — adds a contact for the selected site. If "all" is selected, the button disappears, and you can't add a new contact. Contacts have to be associated with a site. Automatically selects the new contact, and goes to the first name field in the detail section. If this is the first contact for the site, it makes it the primary.

delete contact — pops a modal dialog confirming intention to delete, then deletes. also deletes associated phone and email records, and alert join records.

select contact — hilites selected portal row, and shows details for tha tcontact below.

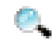
contact alert — actually creates a join record through a relationship with the selected value

contact details site — not editable, because of logic problems: if you changed a primary contact to a site which already had a primary it would not know which is the primary contact. Must be managed by selecting the site first and then adding the contact.

Find — Pops up a customer find window; find always filters to the current logged in person's location

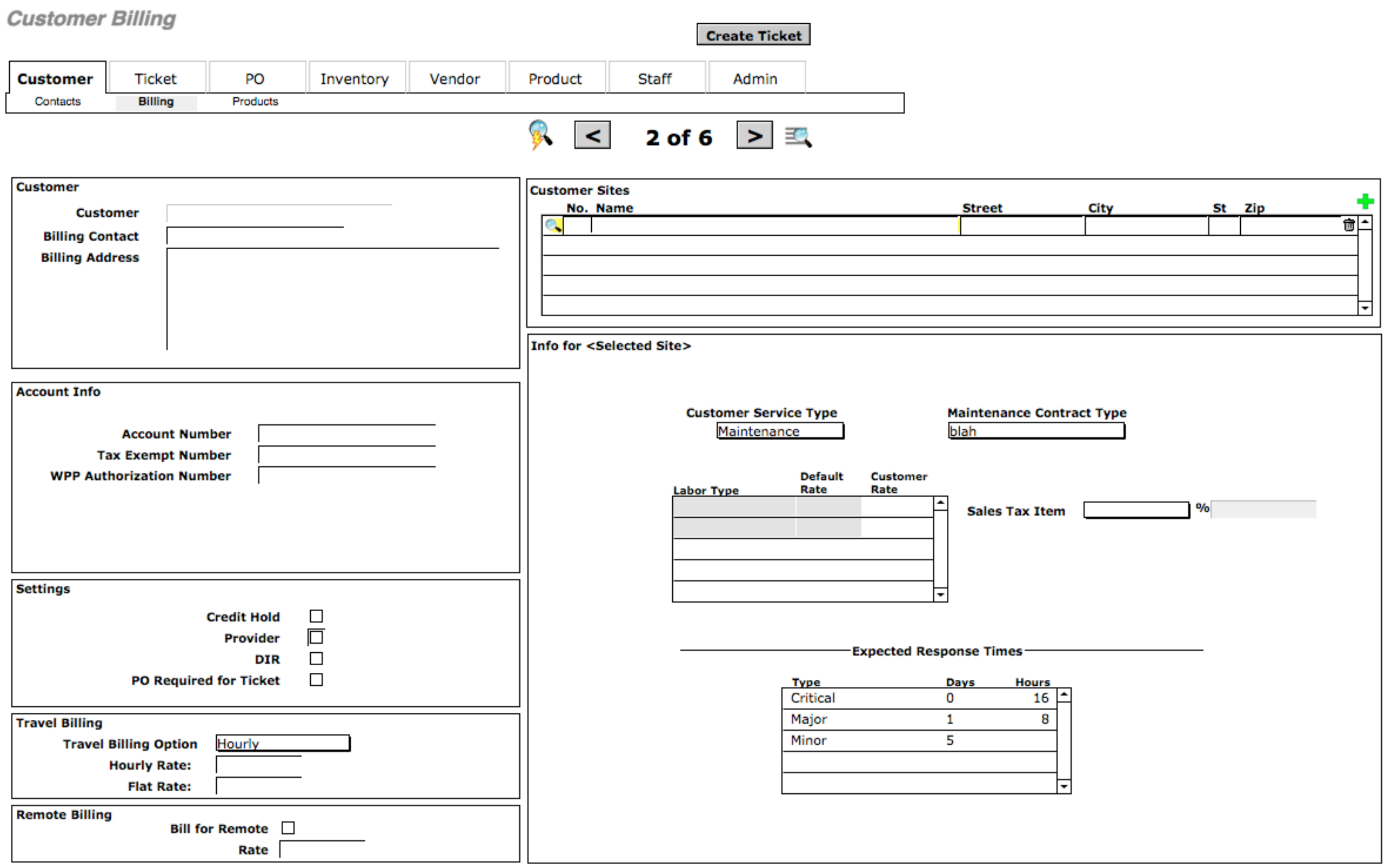
Wire Frame Report

Customer Contacts nav

List View	Pops up a customer list window, with the current found set showing	
Navigate	goes back and forth through the current found set	< **2 of 6** >
first login behavior	finds all for the current logged in person’s location, unless it is the Dallas admin op mgr, in which case it simply shows all. In either case, sorted in creation order (unsorted)	
all portal selections	all portal selections are stored in text fields as part of the customer record, not in global fields	
Account Manager	Popup Menu of Sales Persons for this Aff location	

Wire Frame Report

Customer Billing nav



Billing Contact Drop Down type ahead; Value list is filtered to contacts for this customer

Billing Address auto-enters the billing address contact’s site address, concatenated into this field

excluded fields Moving to QB’s, so this isn’t needed, it is stored in QB’s; These fields include Customer Payment type, Customer Payment, and invoice terms

Customer Service Type This has a vlaue list that is hard coded into the solution, in a normal textual value list as here.

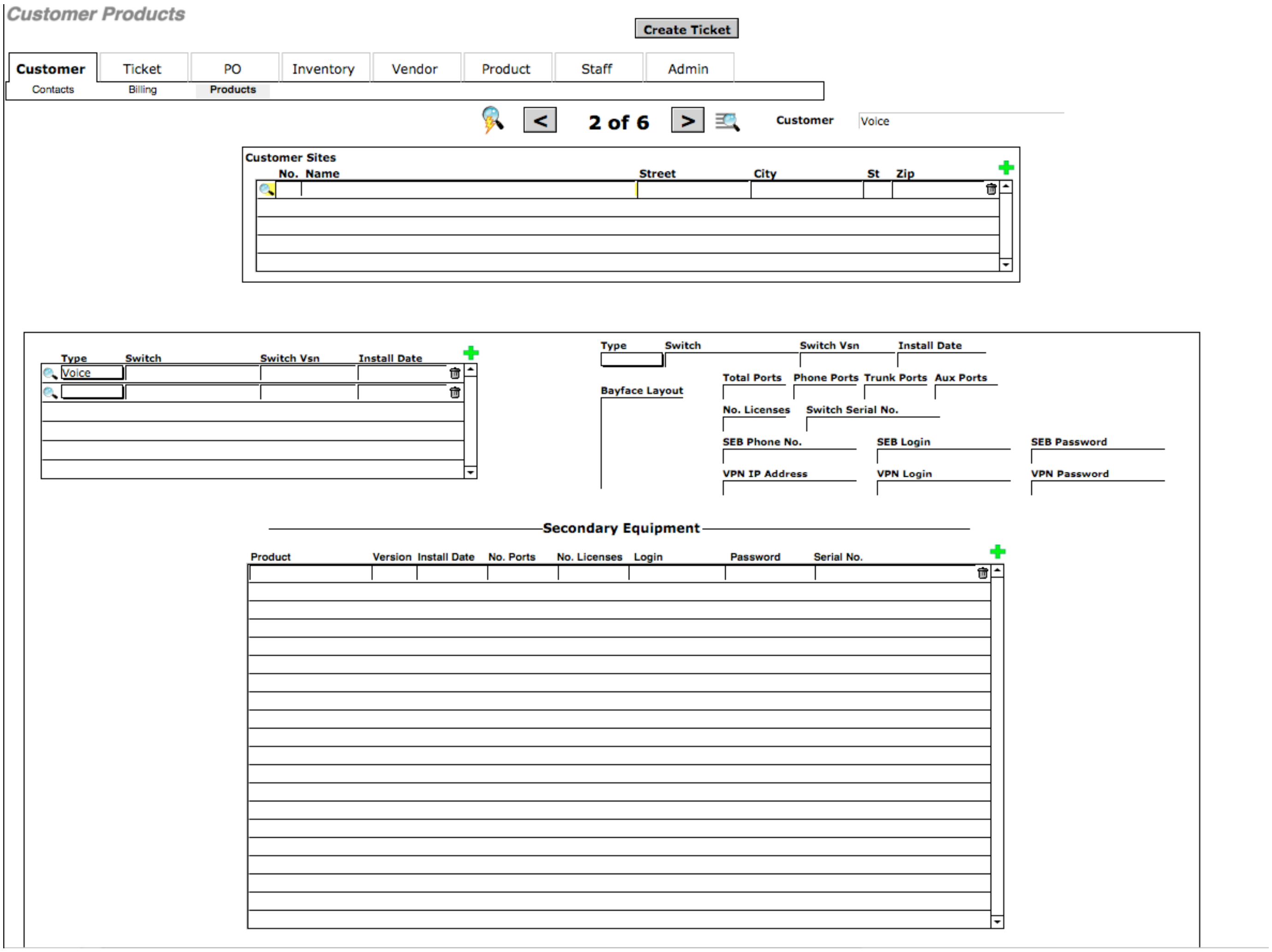
Maintenance Contract Type Value list from the appropriate table as on the admin/global page

Auto Enter values Sales tax rate, hourly, flat, and trip charge, remote billing rate all auto-enter from the admin page values

Credit Hold This does not come over from QB, but is manually set by Aff management.

Wire Frame Report

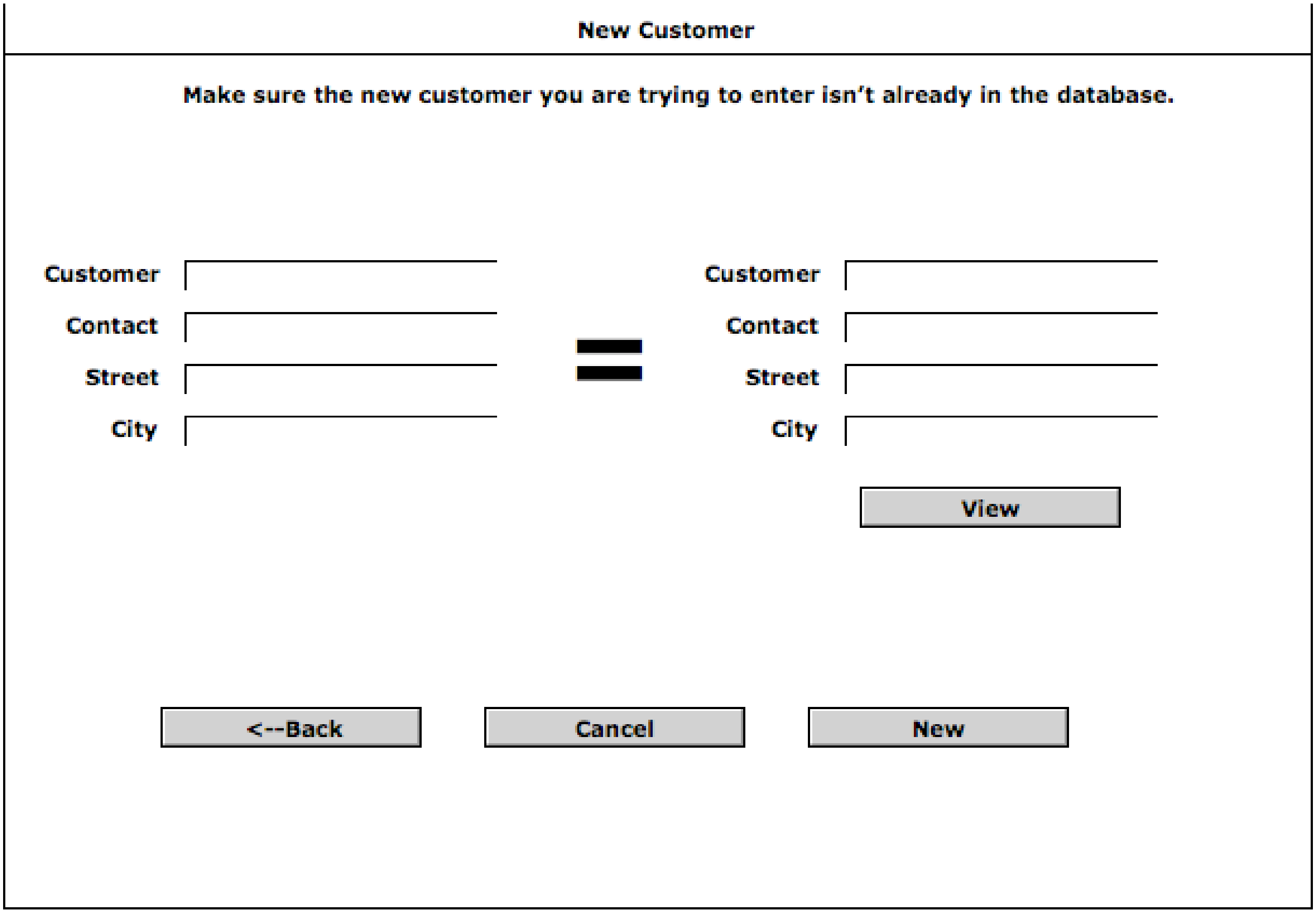
Customer Products nav



select site select a site to see the associated products for that site below

Wire Frame Report

Customer New pop



match info initially, this doesn't appear. One information has been entered, and new clicked, if there is a match, it shows the match, and the new button text changes to "New - Override Match"

Back only appears if there is a match after clicking "new"

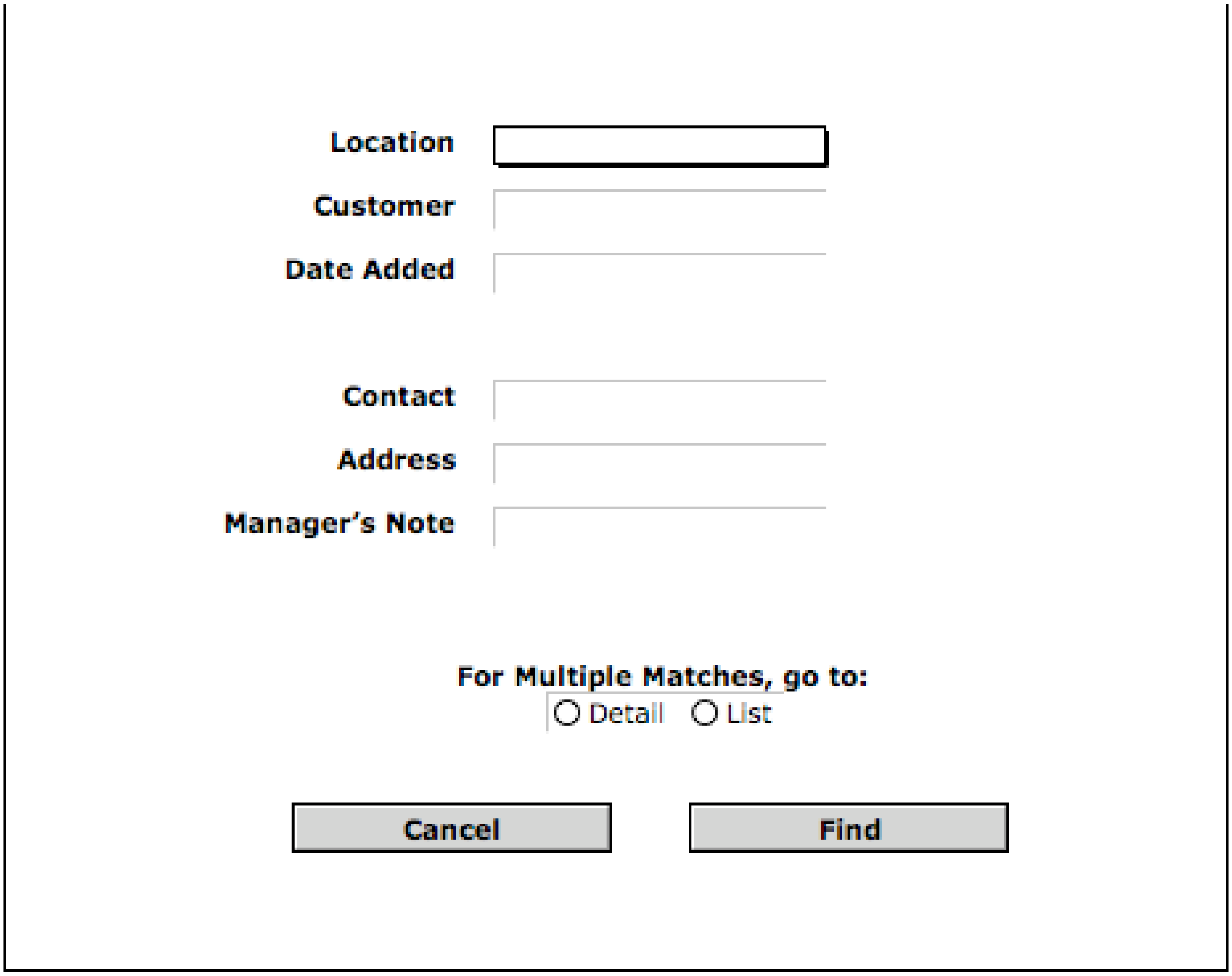
Cancel Closes popup window and goes back to the original window.

New checks first to see that all fields have entries. Then checks to see if there is a partial match against a customer for the customer, site, and contact. If not, creates the new customer and adds these values. If so, shows the match info and view button, and the new button changes to "new - Override Match"

View closes window, and goes to that customer as the only record in the found set.

Wire Frame Report

Customer Find pop



Location	auto-enters logged in user's locationhidden unless logged in user is admin operations manager
Multiple Match option	If only one match is found, always closes this window, returns to original window, establishes single found record as teh focus, and only record in the found set. If Multiple matches are found, Detail option returns to original screen with 1rst match as focus and several in the found set, but showing only one. If Lis, this window does NOT close, but goes to the list view popup, where a customer can be selected.

Wire Frame Report

Customer List pop

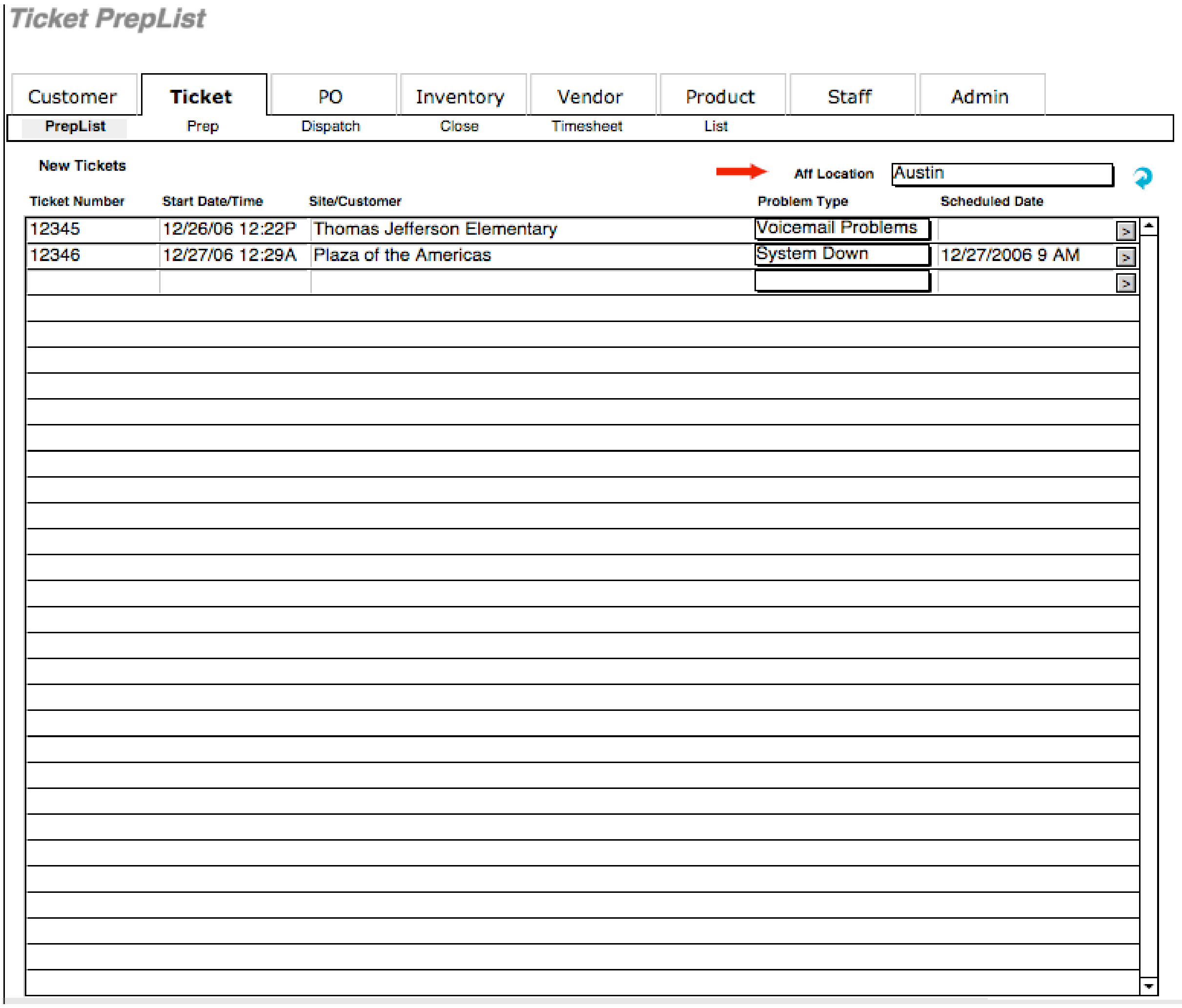
Customer List

Customer	Affiliated Location	Address	Primary Contact

Layout list view layout; click a row to select, which closes window and goes to that selected record with the same found set and the same sort order.

Wire Frame Report

Ticket PrepList nav



Aff Location	This only appears for the Dallas admin user; otherwise it defaults to the logged in person's location and isn't visible
Customer/Site	If a single site customer, shows only the customer name; if multi-site customer, shows their SITE/CUSTOMER, not the other way around
portal arrow	actually if you click anywhere on the entire row, it selects it and takes you to that record within this found set on the Ticket/Prep layout
Portal found set	All tickets with status of "New" or "Incomplete" are found upon navigating to this layout the first time in a session, and are further filtered by the location. These ticket ID's are put into a multiline key, and remain here for this user's session until they log out.
Refresh	Drops any tickets that have been prepped or dispatched without logging out...
Hilited Rows	If the ticket severity level is critical or major, that row hilites red and sorts to the top of the list in the sort order

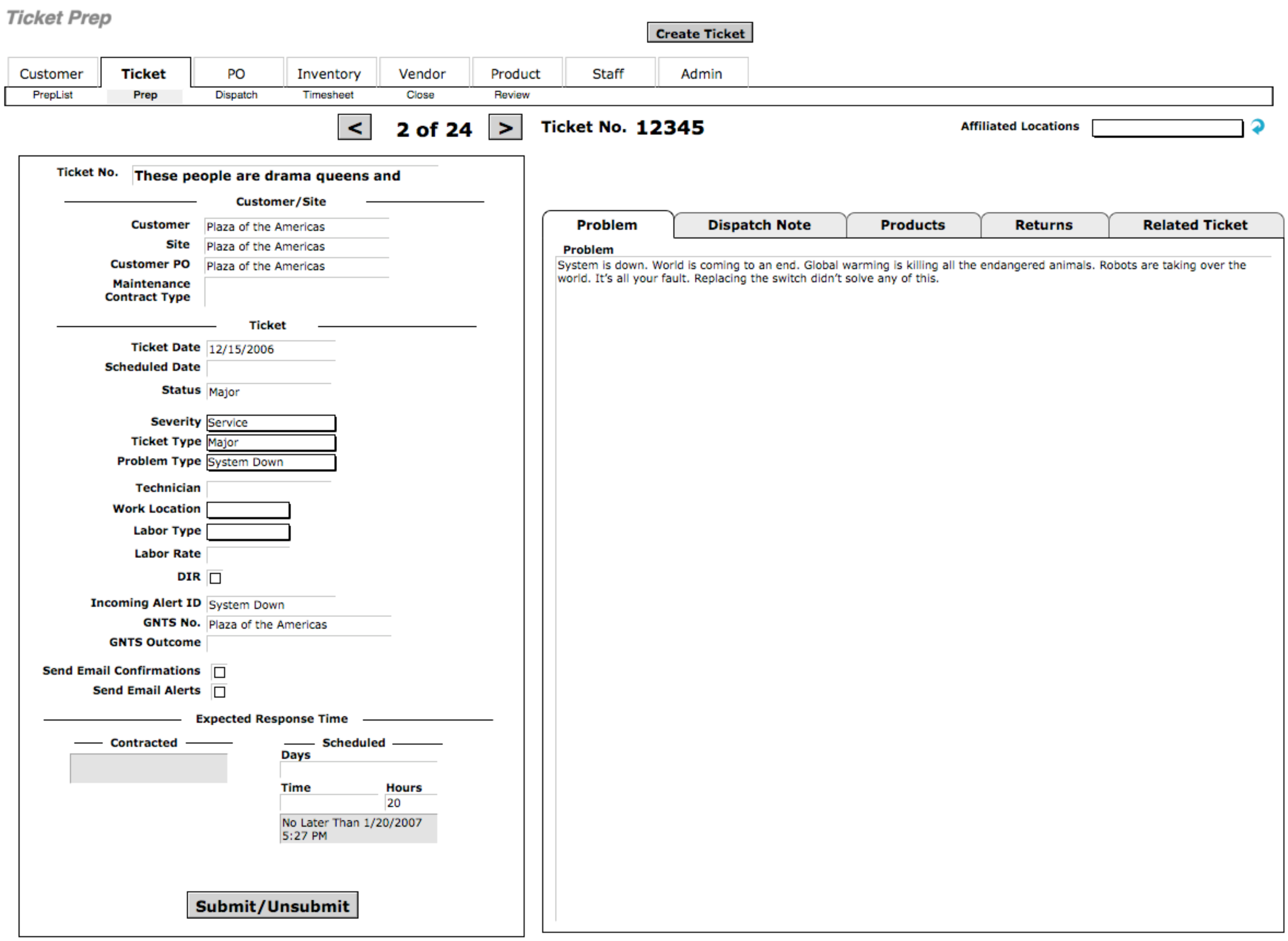
Wire Frame Report

Ticket PrepList nav

Selected row	The current ticket in the Prep layout is hilited yellow on the portal row here
List view	Jan 16, 2007 Rudy would prefer a list view instead of a portal

Wire Frame Report

Ticket Prep nav



Previous Record "<" — Goes to previous record, hilites appropriate portal on the PrepList screen

Next Record ">" — Goes to next record, hilites appropriate portal on the PrepList screen

Products/Product Type — a type ahead value list of all product types

Products/Sub Type — a type ahead list filtered by Product Type selection

Products/Product — a type ahead list of product numbers which also show a portion of the description; when selected, it shows the product no. in the field

Products/+ — adds a product to the ticket to either get from inventory or order on a PO from a vendor; once clicked, creates a portal record below, and sets the cursor in the Ord'd field

Products/Ord'd — quantity of items needed for the ticket; entered manually within the portal

Wire Frame Report

Ticket Prep nav

Products/Invtry Shows the products in inventory for the chosen location, minus the count of products for tickets in this list that have been committed

Price auto-entered from the product price adjusted for customer and product discounts for DIR and WPP

Affiliated Locations This only shows for the departments set in admin/global; for others, it auto-enters their location at login and hides this option

Refresh List Re-evaluates the found set for tickets that are status NEW for the chosen location; appears for ALL operations manager, not hidden like the location chooser

Returns Tab Puts items on a list so the system will know what products and how many to expect back into inventory before the ticket can close

Delete Button Deletes a portal row

Unsubmit If status is not new, moves it back to new status, removes from dispatch and PO queue. Adds a status history and timestamp to the ticket history; does not reverse this. Also creates an inventory record adding the products back if they were free and subtracted from free inventory for this ticket, freeing those items back up for allocation.

Submit and Unsubmit are the same button with dynamic text; if it has been submitted, the button says unsubmit; if it has not been submitted, or has been unsubmitted, it says submit.

Submit If there are no products needed for the ticket, sets the status to "Ready" and moves it into the dispatch queue. If there are products associated with the ticket, and there is no free inventory for the products, status gets set to "PO" and moves into the PO queue. If there are products associated with the ticket and there IS free inventory for the ticket, sets the status to "Ready", and creates an inventory entry for these product lines subtracting these items from inventory. Records the status of the ticket with a timestamp into the ticket history table.

Submit button changes to say "Unsubmit"

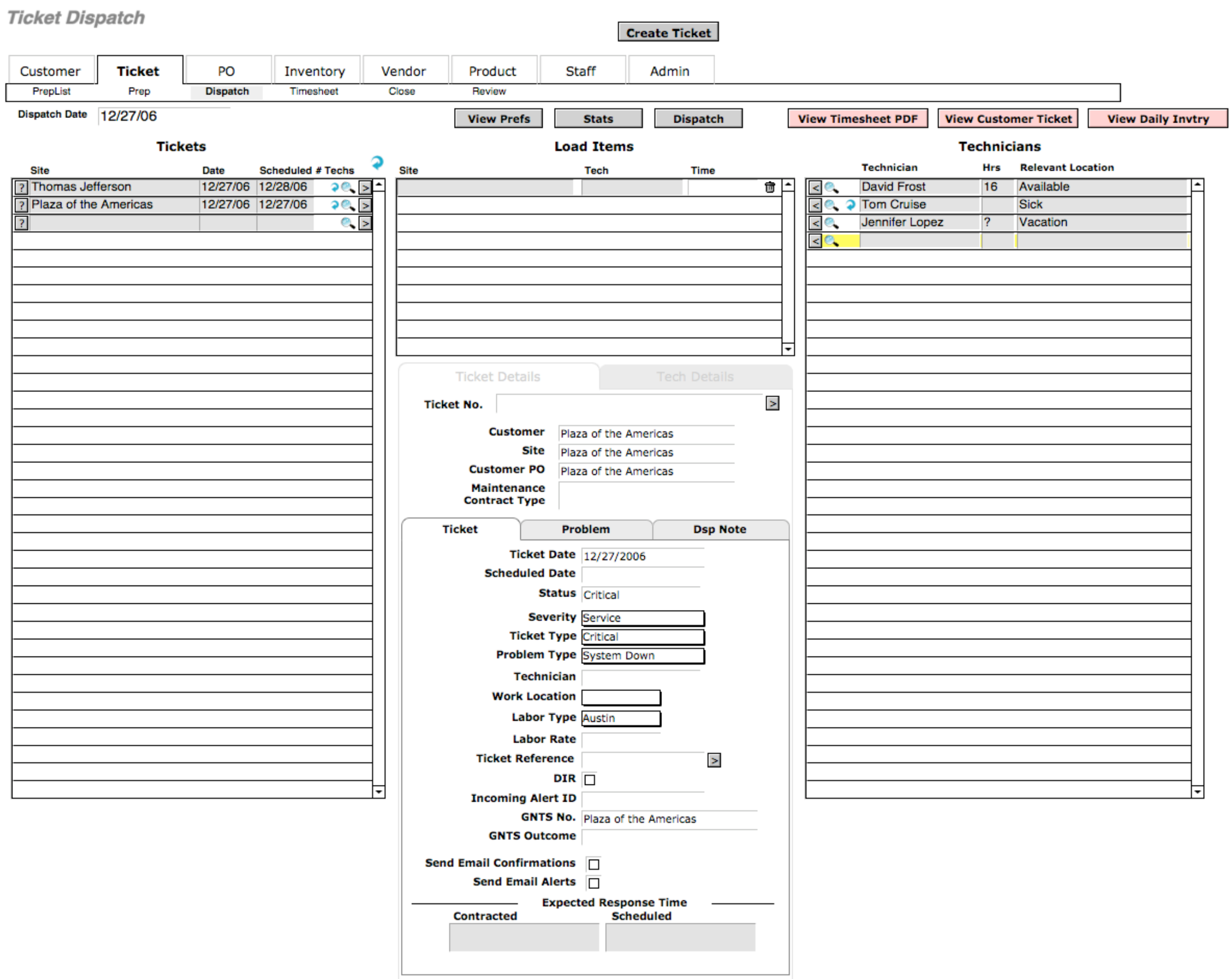
Wire Frame Report

Ticket Prep nav

Product entry	Jan 16, 2007 Rudy: 1. choose product by description; the popup list shows the description concatenated with the prod no. with a monker for whether it is refurbed or not. Also choose by product number; two products can have same number but be refurb or not refurb. Choice should show this, and price should auto-enter accordingly. In products, remember that there are two entries esparately for the same product for refurb or non-refrub, and inventory is tracked separately. If refurb, the product description will contain this information...
Related Ticket	Jan 16, 2007 Rudy: You can choose a closed ticket from a list that filters to only closed tickets within the last 30 days for this customer/site.
Products/Inventory	auto-enters amount that is available from inventory; if it fulfills the order 100%, doesn't go to purchasing.
Labor type and rate	The customer looks up labor rates from the global admin table. The ticket looks it up from the tech's default labor type, and gets the rate from that. This rate can be edited on this screen.
Expected Response Time	This is pretty confusing, but this is it. if the ticket is MAJOR or CRITICAL, it calculates the days and hours based on the hours in the hours field that it looks up from the customer. If it is minor, it calculates according to this: If the ticket is minor, the hours do not show. If it is major or critical, ONLY the hours show. For minor, if days says 1-5, then ONLY AM/PM shows as a choice for the time. The Response time says "No later than " and the ticket date + that many days, + AM or PM. If the days has an actual date, the time has no value list, and validates to have a valid time. If someone chooses the MMDDYYYY option, it puts the date that is the number of days for their customer site preference. Time

Wire Frame Report

Ticket Dispatch nav



Tech's Relevant Location Gives either "Available", a conflicting load item site concurrent with the date and time expectation of the selected ticket, or vacation or sick or training leave

Dispatch Date auto enters today's date when first navigated to this screen per session; has a calendar popup when clicked into

View Prefs Pops up the Dispatch view prefs window

Stats Pops up the dispatch statistics window

Dispatch Sets the status of all tickets shown here to "Dispatched" and creates a time sheet PDF for each tech, and separate customer ticket PDF's for each client, and a daily inventory report for each tech for the day, assembles each into a single PDF, and emails these to the techs; also gives each ticket a new ticket status history child record with the status and timestamp. IMPORTANT NOTE: Also creates inventory ledger entries subtracting the loaded items out of inventory, and updates the totals for the product records

Wire Frame Report

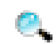
Ticket Dispatch nav

? If hovered over, gives a tooltip with the type, level, and problem; if clicked, pops up window with details about the ticket, without selecting it

Refresh List Refreshes the list to show only tickets in the ready status for the selected location

Tickets Portal The portal on the left side, shows a list of tickets with a status of Ready; sorted by problem level, response time (a calc field showing alternate if it exists, else contracted), and then creation order; critical items are hilited red unless they are actually selected, then they are hilited with the hilite color. Note that none of the fields in this portal are editable or enterable. Also, a click on a portal row anywhere is the same as clicking the magnifying glass, and a shift click is the same as clicking the arrow. Prepped tickets that still have products that have not been received do not show up here, they are in PO status. Once all products have been received the ticket status is triggered to change to “Ready” and it shows up in this screen.

Ticket Magnifying Glass hilites the portal row, shows ticket details in the lower middle section of the screen. Also shows load items in the middle top portal for that ticket, and causes move arrows to appear in the technician portal. Move arrows disappear from the tickets portal. If there is a prior ticket associated with this ticket, it shows a refresh arrow graphic for that tech.



Ticket Move arrow Only appears if a technician has been selected by clicking the magnifying glass for that tech. If clicked while not appearing, the script does nothing. If clicked while a tech is selected, it creates a load item for that tech for that ticket. It ends by having the cursor in the time field in the load items portal.

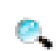
delete load item Deletes a load item from the portal

Load item portal sorted only by creation order; Site and Tech are not editable. Time is editable.

Ticket Details Middle lower screen, shows when a ticket is selected with the magnifying glass. The screen will not actually show tabs for ticket details or tech details, it will simply show what is appropriate for the selection. None of the fields in this section are editable

Technicians Portal Alphabetized by full name, first then last.

Technician Magnifying Glass hilites the portal row, shows technician details in the lower middle section of the screen. Also shows load items in the middle top portal for that technician, and causes move arrows to appear in the ticket portal. Move arrows disappear from the technician portal. If there are prior tickets associated with this tech, it shows a refresh arrow graphic for each one.



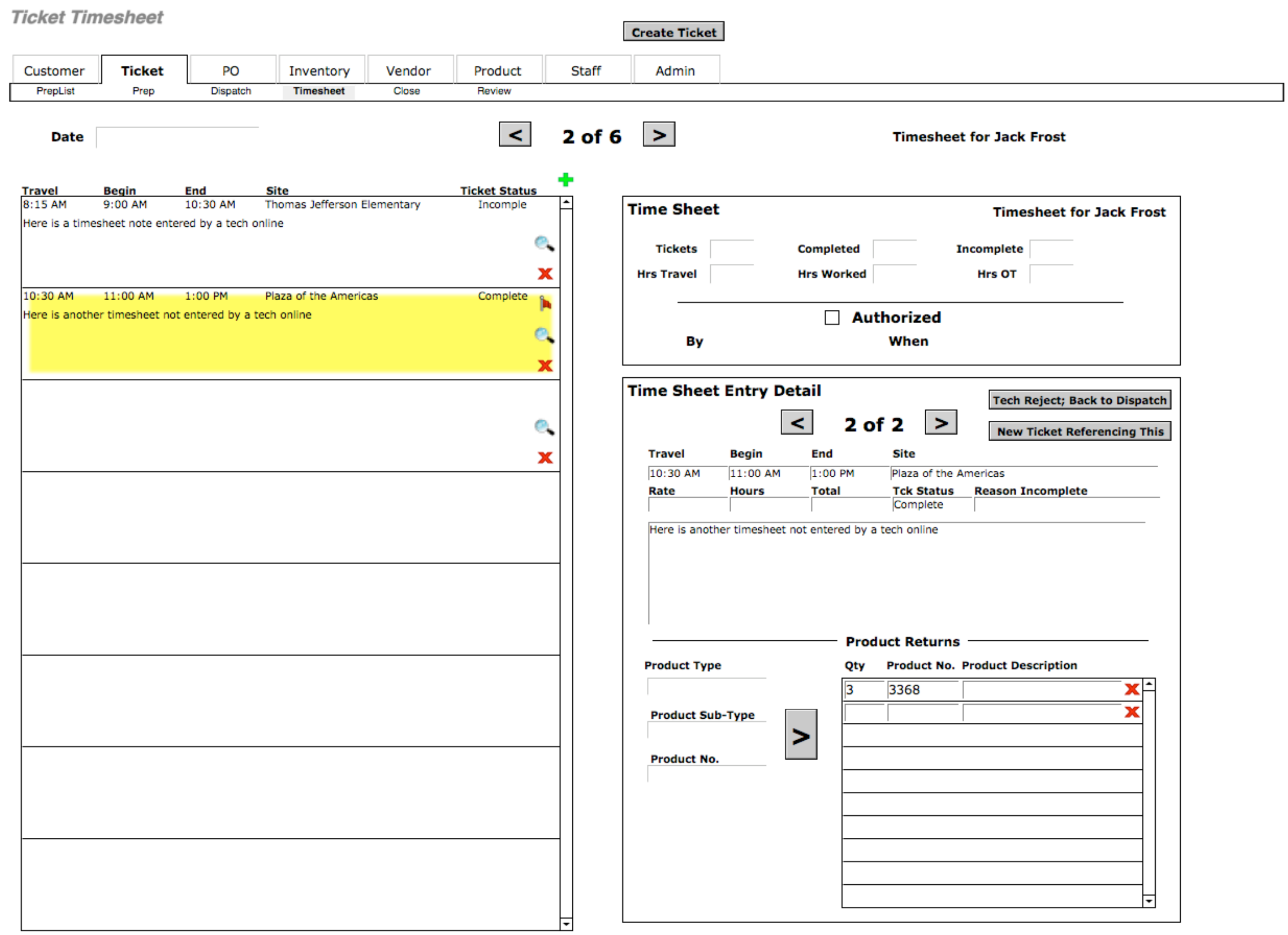
Wire Frame Report

Ticket Dispatch nav

Technician move arrow	Only appears if a ticket has been selected by clicking the magnifying glass for that ticket. If clicked while not appearing, the script does nothing. If clicked while a ticket is selected, it creates a load item for that tech for that ticket. It ends by having the cursor in the time field in the load items portal. If they have vacation, sick, or training time, pops a warning modal dialog, but can be overridden and loaded anyway.	<
Technicians Hrs	shows the hours loaded for that tech for the selected dispatch date, accounting for both previously loaded items that are already dispatched that are not appearing on this screen, and items that are not yet dispatched but loaded on this screen.	
Technician Relevant Location	for the given dispatch date, shows either available if nothing is oaded for that dispatch date, or sick or vaction or training if relevant. If there is a load item for that tech, and no ticket is selected, it shows the first load item for that tech for that day. If there is a ticket selected, it shows the tech's availablity according to the response time for that ticket that is demanded. If a tech is busy in the morning but the ticket asks for an afternoon appearance, it shows available.	
Timesheet	When dispatch is clicked, a pdf is created for each appropriate tech and emailed as an attachment. this button will NOT appear on the layout, but is here as a reminder that this pdf will go out, and its format must be reviewed. The file should be named "timesheet_<ddmmyyyy>.pdf	View Timesheet PDF
Customer Ticket	PDF's of each ticket will be created for teh techs and attached to the same email noted above, named the ticket_<number>.pdf	View Customer Ticket
Daily Inventory	The inventory that will need to be gathered in order to fulfill the daily load, in a pdf report. named "inventory_<ddmmyyyy>.pdf	View Daily Invtry
Drill to ticket or related ticket	goes to review screen, with ticket or if applicable the related ticket and the ticket in the found set.	>

Wire Frame Report

Ticket Timesheet nav



Date Autoenters today's date upon startup; includes a calendar dropdown; triggers new found set when changed. The date is the only find available for timesheets.

timesheet nav buttons goes from one tech's timesheet for the selected date; if no detail record has been selected, it selects the top record; otherwise the prior selection for that timesheet persists.

timesheet entry detail nav buttons goes from one entry to the next that appear in the portal to the left. Should have a corresponding menu item and key command under the Navigate menu

Add entry creates a new time entry for this tme sheet, selects it, displays its details to the right, and puts the cursor in the travel time field, Also updates the "2 of 2" display.

select time sheet entry hilites portal row and shows details to the right. Also updates the "2 of 2" display.

Wire Frame Report

Ticket Timesheet nav

Delete Time Sheet	After a warning modal dialog, deletes the portal row record, selects the record above it, and updates the “2 of 2” display. Also cascade deletes any return products for that ticket	
Product No.	Product No. VL; type ahead; shows Product number and description, but only enters No. and refurb	
Delete Returned Products	Deletes a portal row record for a returned product entry	
product return portal	shows records entered by tech online, if any, or can be manually entered...	
return product flag	Shows if ticket has any returned products	
Authorized	checkmark autoenters the logged in Operations Manager and timestamp; unchecking it removes the entries	
initial found set	today’s date is auto-entered, and the found set is all timesheets for that day.	
Tech Reject	Pops a modal dialog confirming intention. Tech refuses load item; render load item status as rejected, and move the ticket status back to Ready, add a history item with timestamp. Pops a modal dialog saying this all happened.	Tech Reject; Back to Dispatch
New Ticket Referencing	Incomplete tickets automatically show back up in the prep list with the new tickets; no button is needed for them to go back around. This button closes this ticket, duplicates it, and duplicates its problem, return product, and product info to the new ticket. This ticket gets a history record with a timestamp showing that it was closed.	New Ticket Referencing This
Find/List	add a find and list popup to this, so all timesheets can be seen historically. Still defaults to unauthorized ones when first navigating to the screen.	
OT hours	anything over 8 hrs, including travel goes here	
Dispatch access	give dispatch access to this screen	
Find	Find auto-enters the date entry, and if the find doesn’t specify a date, it blanks it out. In fact, these should be the same field. Changing the date on this nav screen triggers a find for timesheets with that date without popping up the find button. this button, and the find menu item, pops up a window to search for timesheets.	
List	Pops up a window with a list of the current found set.	

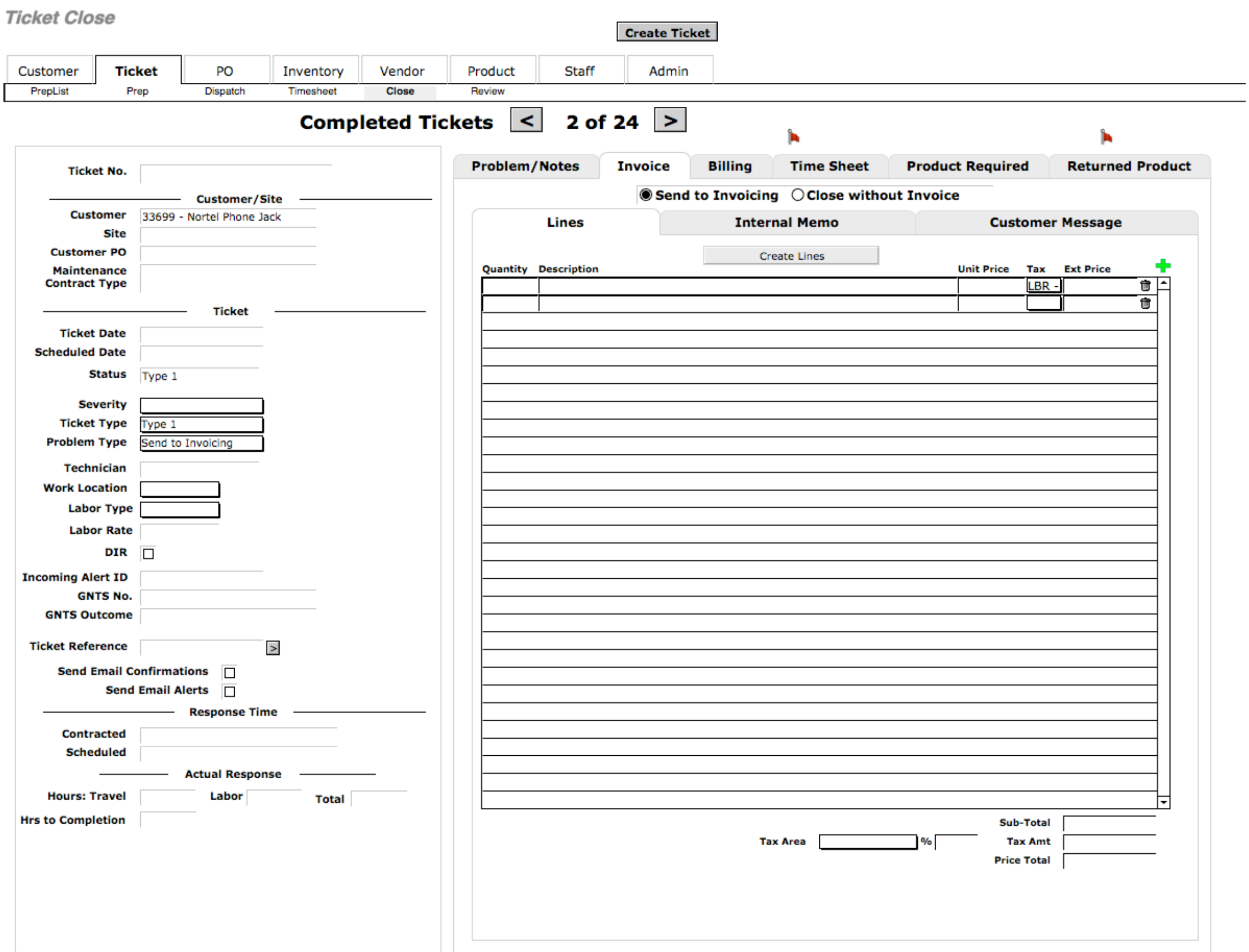
Wire Frame Report

Ticket Timesheet nav

Product Description	Type ahead value list of product description; also shows the Product No. to the right, but only enters the description. Triggers a lookup for the product No.

Wire Frame Report

Ticket Close nav



Ticket Info On the left of the screen; this is all for info, none is editable at this stage, except Send to Invoicing

Send to Invoicing this marks the ticket as approved to go to QB for invoicing that night. It also sets the status of the ticket to "Completed". Once the nightly update has taken place, and the ticket has received an invoice number from QB's, the ticket status is changed to "Closed".

Billing Info Same as in the Customer tab

Time Sheet This shows all load items for the ticket, including multiple techs and multiple days if the ticket was allowed to go that way; no fields are editable from here. rows with unreturned product are hilited red

time Sheet red flag if there are unapproved time sheet entries for this ticket, it shows here 

Time Sheet arrow goes to the timesheets relevant to this ticket under timesheet, with the relevant load items pre-selected for each 

Wire Frame Report

Ticket Close nav

Returned Product Red Flag appears if there are quantities of product expected to be returned that have not yet been reurned

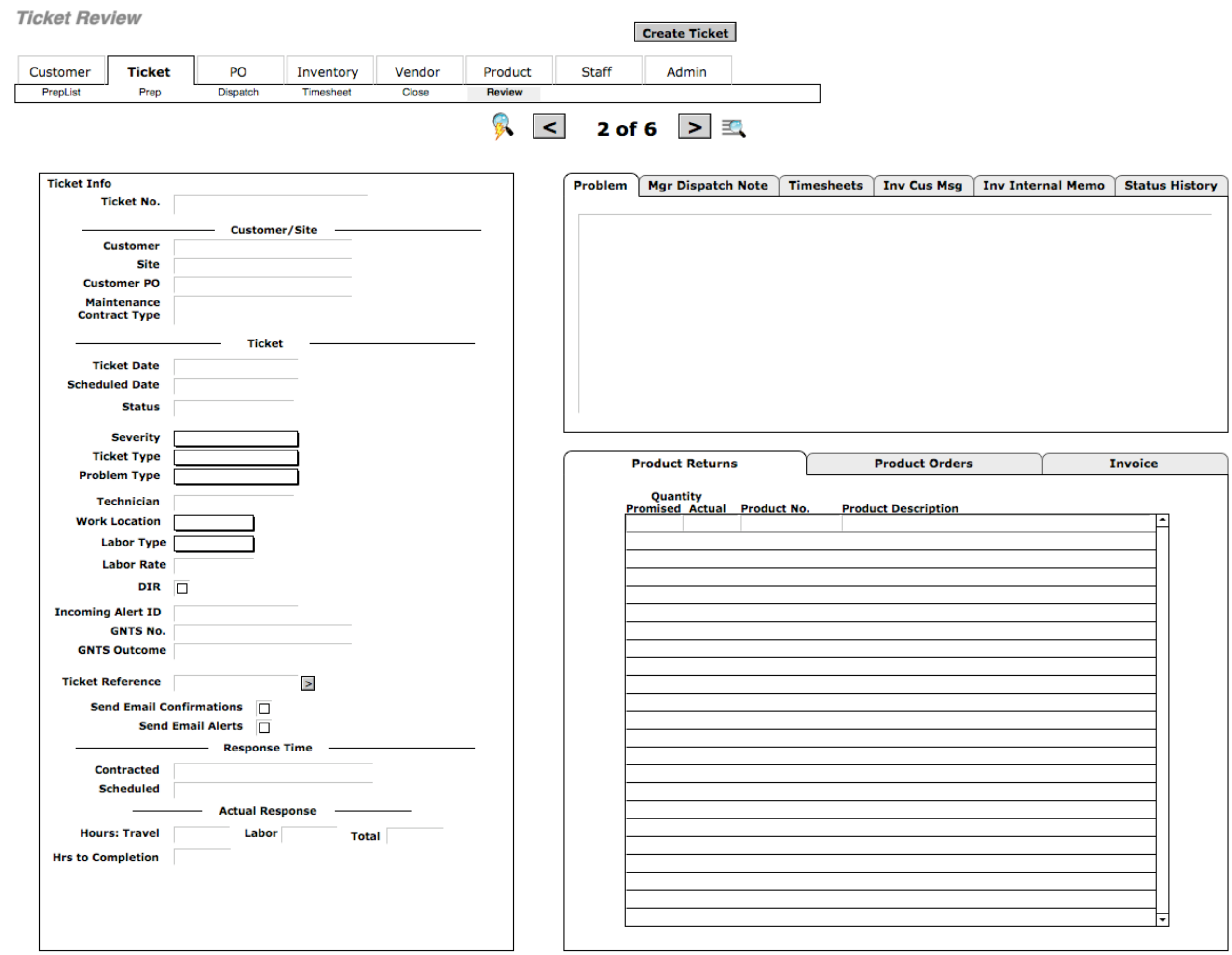
Initial found set Tickets with a status of “Complete”, sorted in creation order

Invoice lines navigation to a ticket, even the first record upon navigation, causes an evaluation of the lines if none yet exist. This happens according to customer prefs: travel and trip charges, per hour or prepay or maintenance contract, and product orders with appropriate discounts. This is all presented for REVIEW, and can be edited extensively at this point. Once sent to invoicing, if it has received a QB invoice number, it will no longer show up here, and is no longer editable.

labor invoice lines labor entries need to account for overtime hours as a separate invoice line.

Wire Frame Report

Ticket Review nav



initial found set — all tickets for logged in person's location, unsorted (in creation order). If admin, shows all records.

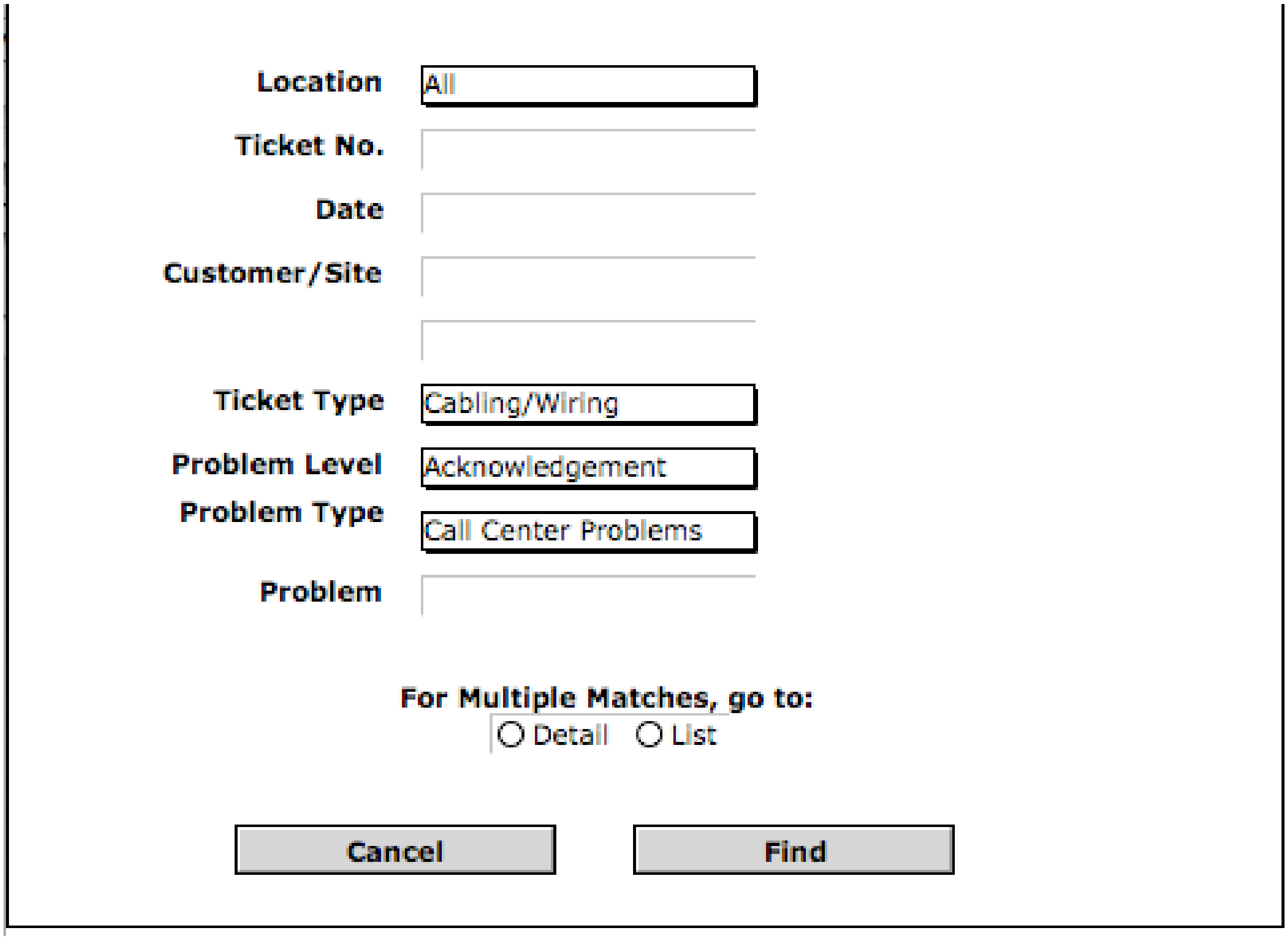
fields — no fields are enterable on this layout.

Status History — sorted descending, so the most recent is at the top

Product Orders - Source — Lists, inventory, or PO # and vendor

Wire Frame Report

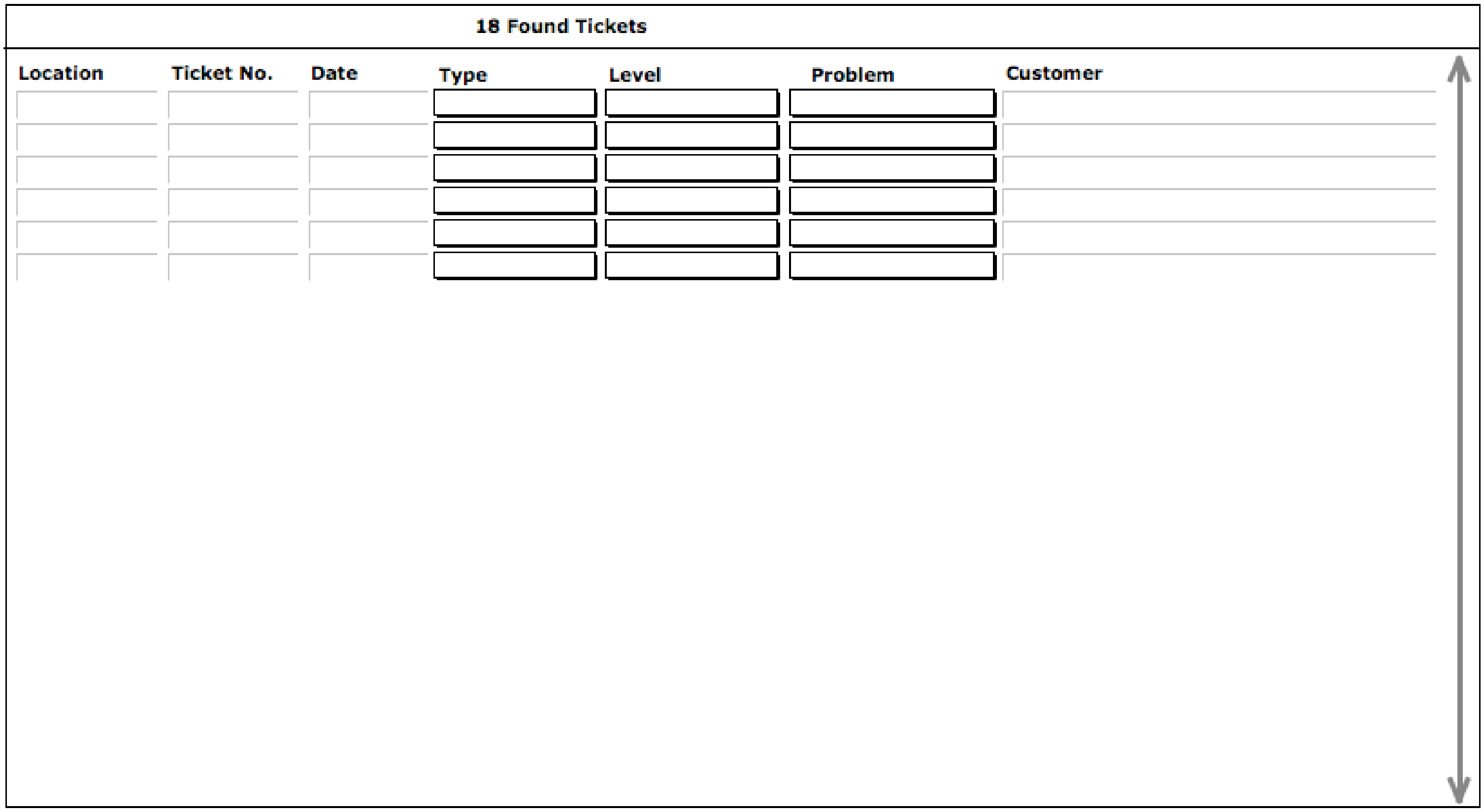
Ticket Find pop



Location Default - logged in person's location; hidden unless Dallas admin ops mgr is current user

Wire Frame Report

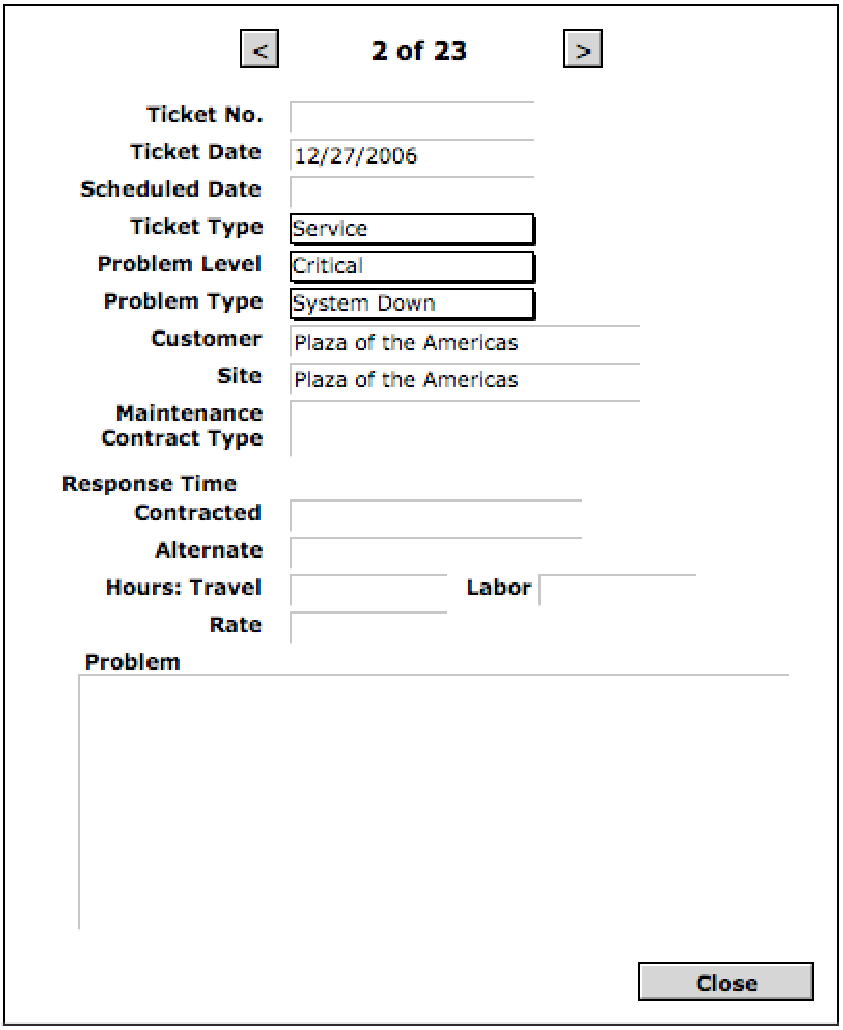
Ticket List pop



Layout Notes List view layout, click a row to select; selection closes window, goes to main window with same found set, sort, and record focus.

Wire Frame Report

Ticket Detail pop



Layout notes form view; click arrows to navigate

Wire Frame Report

Ticket Stats pop

Statistics for Dispatch for 12/29/06 for Dallas Location

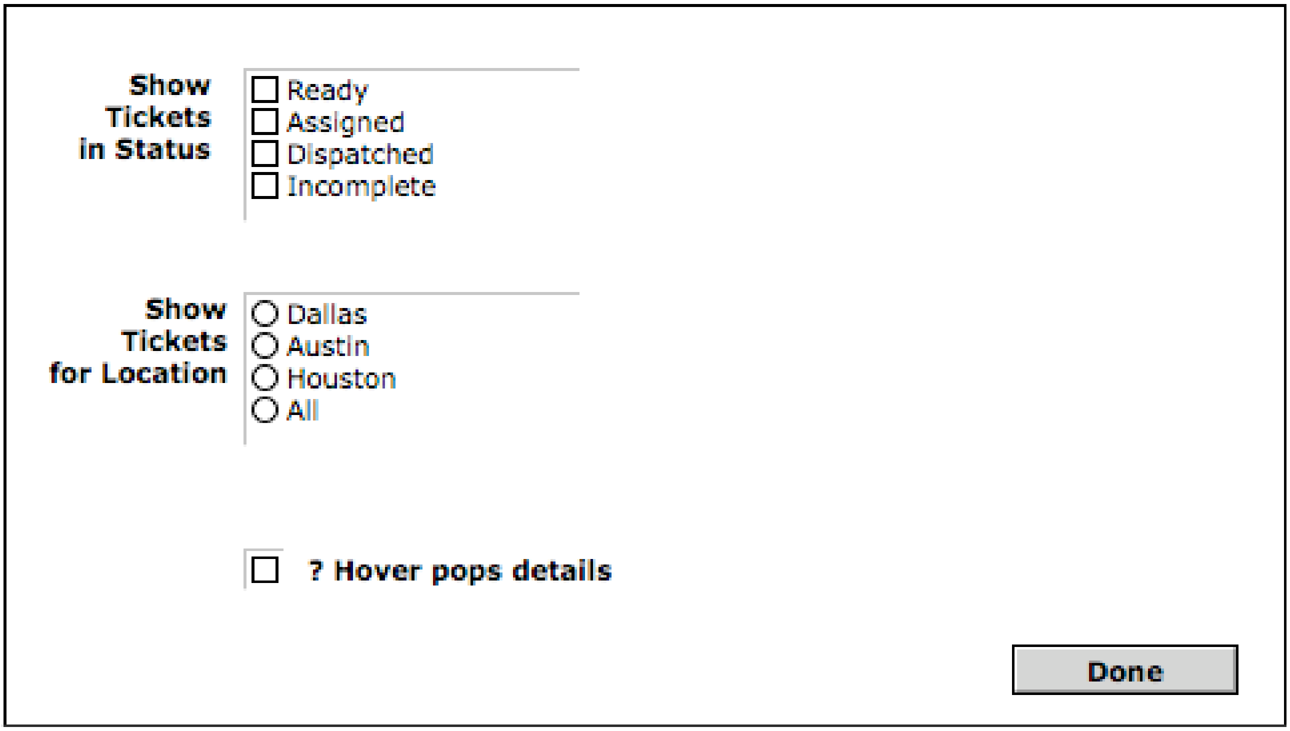
Severity	Count	Loaded	Unloaded
Critical	3	3	0
Major	4	3	1
Minor	8	6	2
MAC	12	3	9
Acknowledgem	0	0	0

Done

Layout Notes based on session table

Wire Frame Report

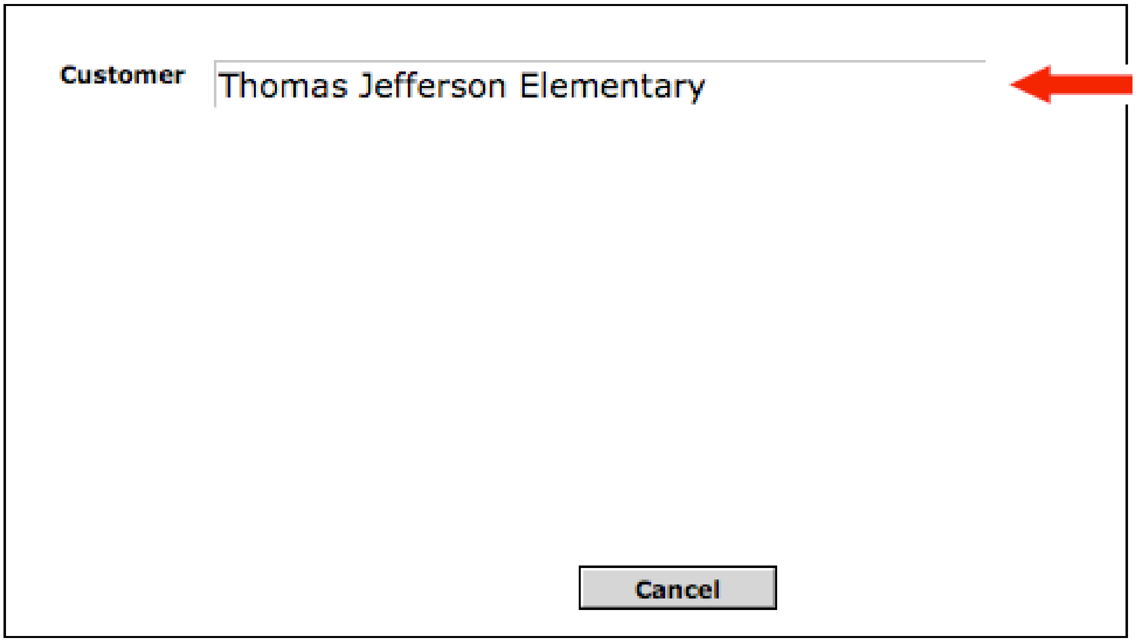
Ticket Prefs pop



Show Tickets for Location	This only appears for the departments selected in admin/global; Filters the tickets and techs; auto enters the logged in Op Manager's location, hides it unless it is the Dallas Op Manager; if changed, automatically triggers the refresh list function
Layout notes	based on session table; these settings are stored per user account.

Wire Frame Report

Ticket CreateChooseCus pop

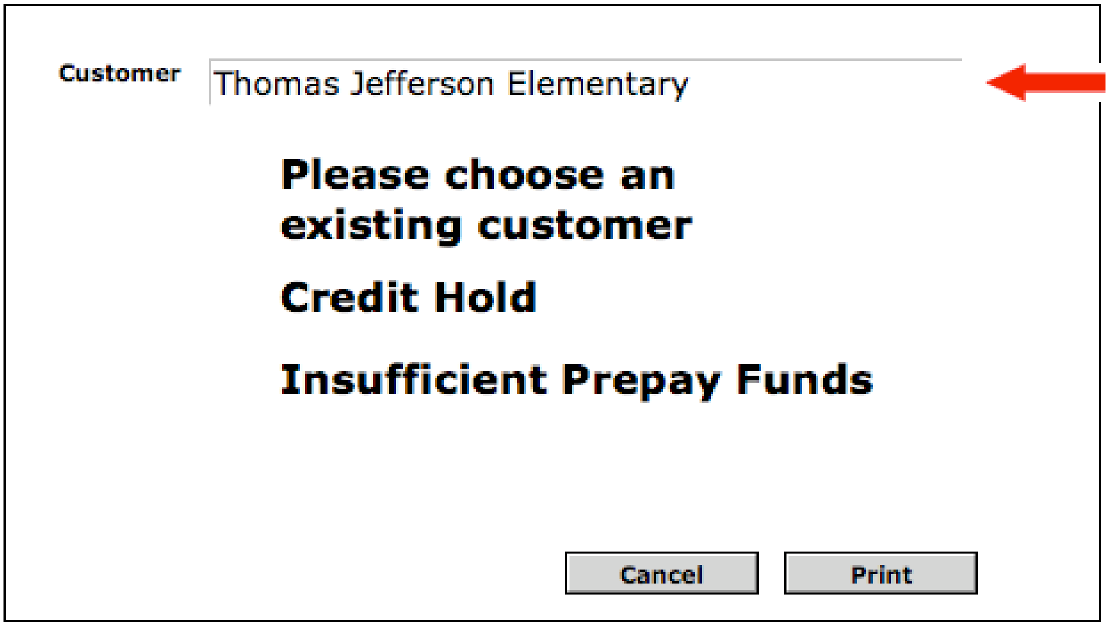


Value List pops up, and once you type, it types ahead to the nearest match, and narrows your choices to potential matching customers

Cancel closes popup window and returns to the original screen

Wire Frame Report

Ticket CreateChooseError pop



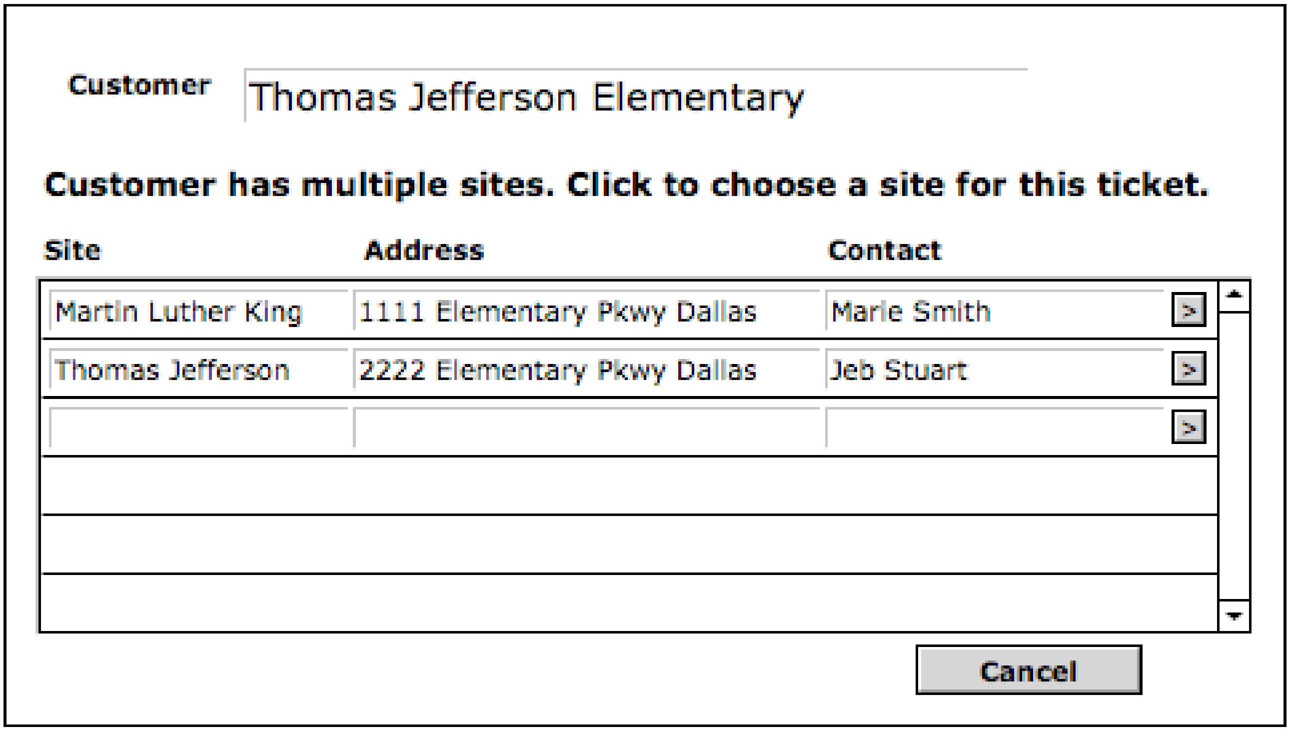
Value List pops up, and once you type, it types ahead to the nearest match, and narrows your choices to potential matching customers

If one of these problems exists for this customer, only that message shows in the dialog.

Cancel	closes popup window and returns to the originating screen
Print	goes to manual print form and prints without dialog to user's default printer, then closes and returns to the originating screen
Customer field	You can still type into here and try to choose another customer

Wire Frame Report

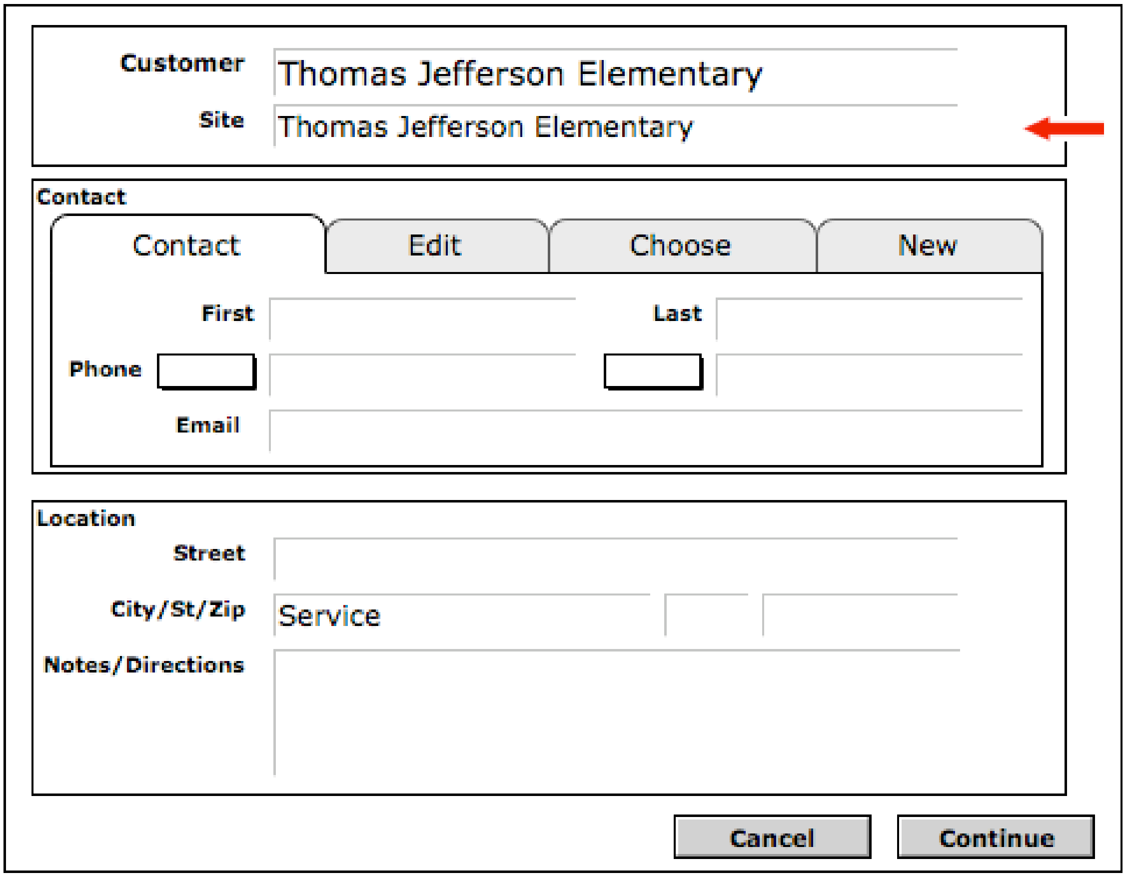
Ticket CreateChooseSite pop



Customer Field	User can type again into this field and choose another customer; once selected or entered, if the new customer doesn't have multiple sites, it skips this screen.
portal fields	tooltip pops up with contents of field in case the text runs over, with instructions to click the row to select it for the ticket
Cancel	closes popup window and returns to the originating screen
portal fields	Click a row anywhere and it chooses that site for the ticket; the fields are NOT editable on this screen
Add new screen	after this, if this site has open tickets, it should show them, so they can explain when the ticket has been dispatched and cancel. Otherwise they progress to the new different ticket.

Wire Frame Report

Ticket CreateConfirmSite pop



If a single site customer, this doesn't appear, it assumes the customer IS the site; if a multi-site customer, this appears to give visual confirmation that the correct site was chosen.

Contact Tab The information here is uneditable, meant for review; the primary contact for the site is entered by default

Edit Tab The same info as on contact tab, but editable. This is so it will be clear that you are EDITING the current main contact, not creating a new contact or choosing another existing contact

Choose Tab This is to review existing contacts for the site; click a contact to make them the main contact for this ticket; returns to the contact tab with their information showing

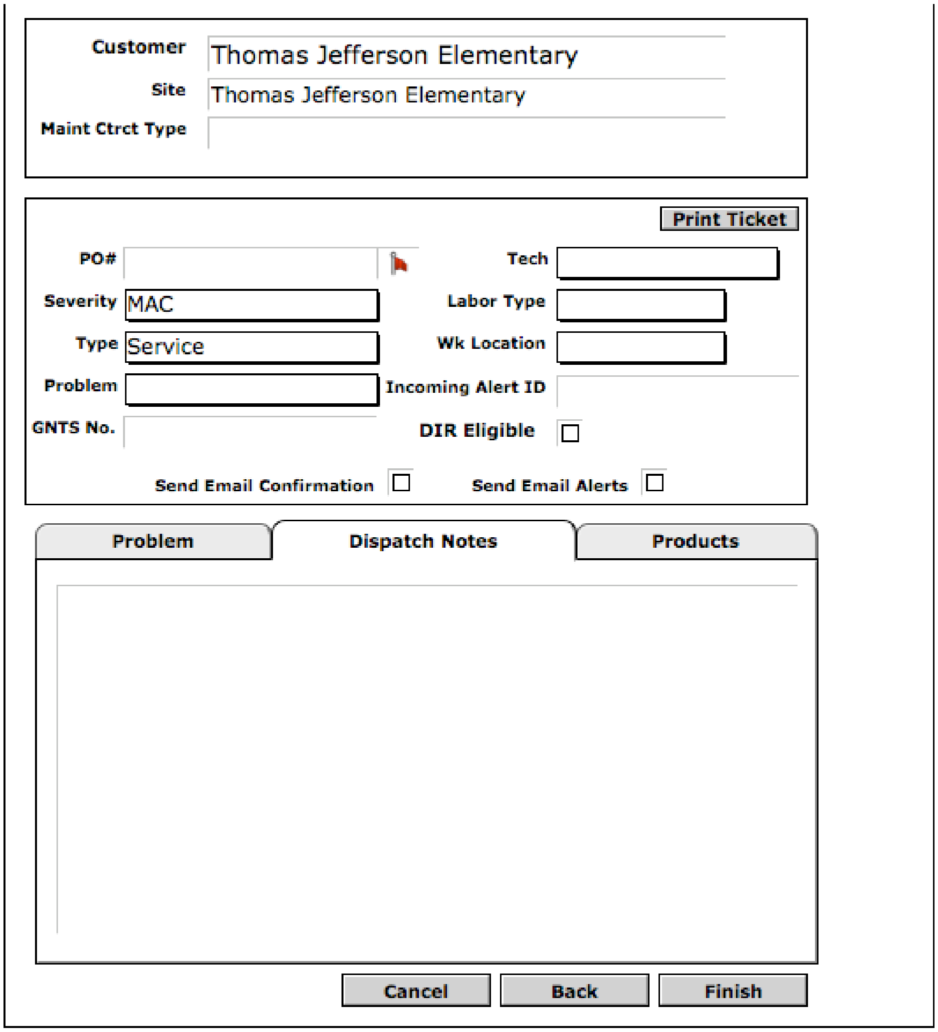
New This is all global fields, fill them in and click create, and it creates a new contact for that site, and established the new contact as the contact for this ticket; also blanks out the global fields afterwards; once clicked, it retruns to the contact tab with the new information entered

Continue goes to popup window for entering ticket info

Cancel Closes the popup window and returns to the originating screen.

Wire Frame Report

Ticket CreateEnterTicket pop



Finish	If this is a critical or major ticket, the button changes to say "continue" and when clicked, it goes on to the immediate dispatch popup window. If Customer requires a PO no. and it has not been entered, finish or continue pops a modal dialog alerting to this, and gives the option to print the presently entered info off to a manual print ticket, or return to popup window to enter it. Once the modal dialog is dismissed, the cursor goes straight to the PO# field.
Problem	This is from a value list that is in a table, editable by the overall system admin; it does not require dev access to change.
PO #	If required, doesn't allow entry until this is filled in. always shows, but if required, says "Required PO" on the field label.

Wire Frame Report

Ticket CreateEnterTicket pop

Finish

Once clicked, creates a ticket, assigns a ticket number, assigns the ticket a status of “New”, creates a ticket history with a status of New and current timestamp. Also sends out alert emails to Aff staff and customer contacts assigned for that customer.

If severity = critical or major, and no tech is chosen, it goes to status “New” (meaning, it goes into the ticket prep queue).

If it is critical or major, and a tech IS chosen, and there is no product, it goes to status “Dispatched”.

if critical or major, and tech is chosen, and there IS product, if the product is in inventory, it removes the product from inventory and sets the status to “Dispatched”.

Products

add a section to this to add products for the ticket within the wizard

Tech chooser

only appears if severity is critical or major

PO Red Flag

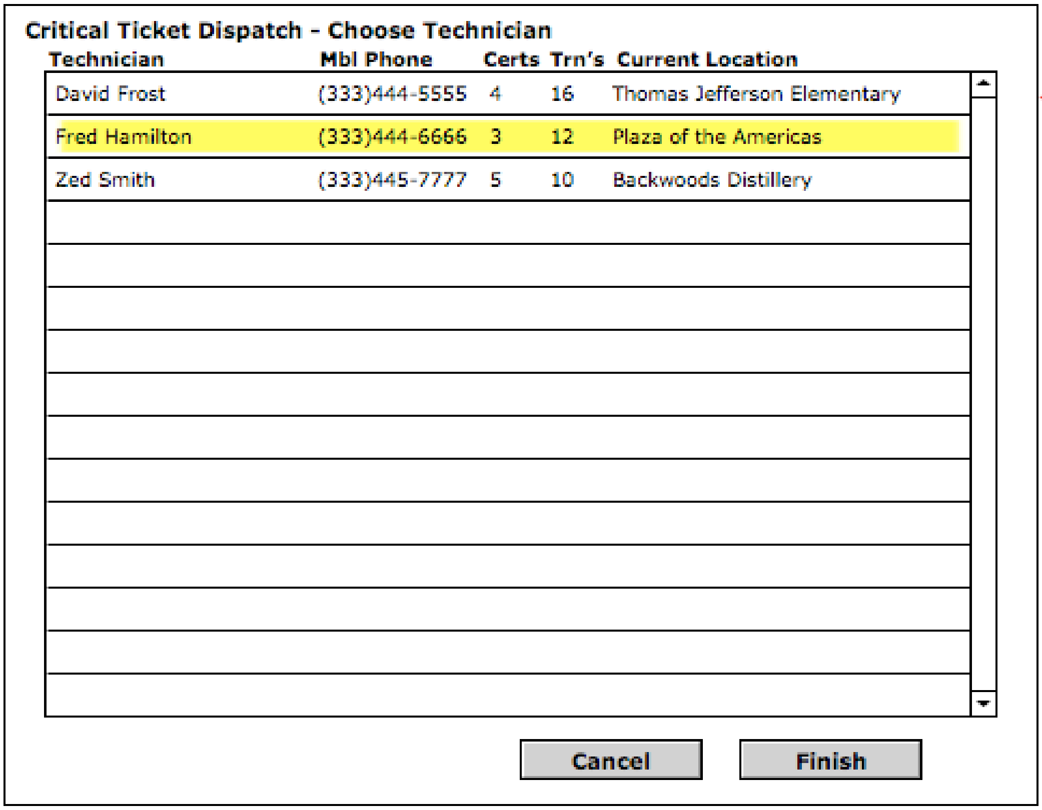
shows a red flag if value is required

Send Email Confirmation

If checked, sends a text email confirmation of the ticket number, date, time severity, problem description of the ticket. This goes only to the main customer email.

Wire Frame Report

Ticket CreateDispatch pop



Click a technician in this list to dispatch them to this ticket. The selected technician hilites; the dispatcher must click "finish" to actually dispatch them.

Cancel at this stage, it pops up a warning dialog asking if they really want to throw all this data away and cancel. If yes, closes the window, deletes any entered data, and returns to the originating screen.

Select a Technician Does nothing except hilite them for the dispatch; action happens when “Finish” is clicked

Finish Sets ticket status to “Dispatched”, sends text message email to selecteed technicican with Customer, Address, Expected response time, and problem description. Also sends appropriate notification emails to selected Aff’d and customer parties according to Customer prefs

Wire Frame Report

Timesheet List pop

(no comment)

Wire Frame Report

Timesheet Find pop

Location	Auto-enters logged in persons location; hidden from non-admin persons.
Customer	type ahead value list
Site	Only appears if the chosen customer has multiple sites for the given customer. This is based on the name, so for customers with the same name, this also works.
Tech	type ahead drop-down list of techs for the selected location

Wire Frame Report

Ticket Timesheet print

Daily Technician Time Sheet

Technician: Jack Frost **Cell Phone: 214-555-1212** **Date: Wed, Jan 3,**

Customer	Ticket No.	Open Date	Due Date/Time	Est Hrs	Travel	In	Out	Total	Ticket Status	Comments	Miles

Total Mileage ______
Regular Hrs ______
Overtime Hrs ______
Sick Hrs ______

____
Supervisor Signature

Customer Database field; filled in automatically

Open Date Database Field; filled in from database

Ticket No. Filled in from database

Due Date/Time Filled in from database

Est Hrs Filled in from database

Travel filled in by tech by hand, later into database

In filled in by tech by hand, later into database

Out filled in by tech by hand, later into database

Total Time would probably just need to be calc'd by database, doesn't need to be on here

Wire Frame Report

Ticket Timesheet print

Ticket Status	filled in by tech by hand, later into database
Comments	filled in by tech by hand, later into database
Miles	hmmm; this is pure print, I didn’t see this in the requirements
regular and overtime hrs	filled in by hand if desired, but once the hours are entered, the database will calc them automatically
total mileage	not in the requirements, so filled in by hand
sick hours	filled in by hand, this is entered on the tech screen
developer notes	this form is printed from a list view per load item, with a header at the top with the technician and phone; it is intended that the script that produces it goes to each tech’s items one by one and prints them to a PDF individually

Wire Frame Report

Ticket DailyInventory print

Daily Inventory **Printed Wed, Jan 3, 2007**

Tech: Jack Frost

Qty	Product No.	Product Description
Ticket 33698		**Thomas Jefferson Elementary**
5	3067 C	Nortel Phone Junction
5	3068	Nortel Phone Widget
5	3069	Nortel Phone
Ticket 33702		**Plaza of the Americas**
5	3067 C	Nortel Phone Junction
5	3068	Nortel Phone Widget

Daily Inventory This is a subsummary report by ticket of products; the entire found set is a single tech's ticket load for a day; this goes out as a PDF in an email once the ticket has been dispatched

Wire Frame Report

Ticket CustomerTicket print

Work and parts used in completing this service order are considered satisfactory unless problems are reported to ATI service department within 48 hours of completion.

Affiliated Telephone, Inc.
730 Ave. F, Suite 210
Plano Texas 75074
972-423-4222

Customer Service Order

Ticket No.	Received	Type	Level	Tech
59608	12/30/2006 11:30 AM	Service	Minor	Jack Frost

Customer	Site	Address	Contact	Phone
City of Fort Worth	City Hall	1000 Throckmorton Ft. Worth TX 76211	Gary Smith	(817) 555-1212

Problem description goes here...

Qty	Part No.	Description

Ticket Complete? Yes____ No____ Reschedule For: ____________________ Onsite ____

Customer Advised? Yes____ No____ Contact: ____________________ Remote____

Forms attached for this ticket? __________ Arrival Rpt To: ________ Depart Rpt To: _______

HOURS: Travel _________ (AM/PM) In _________ (AM/PM) Out _________ (AM/PM)

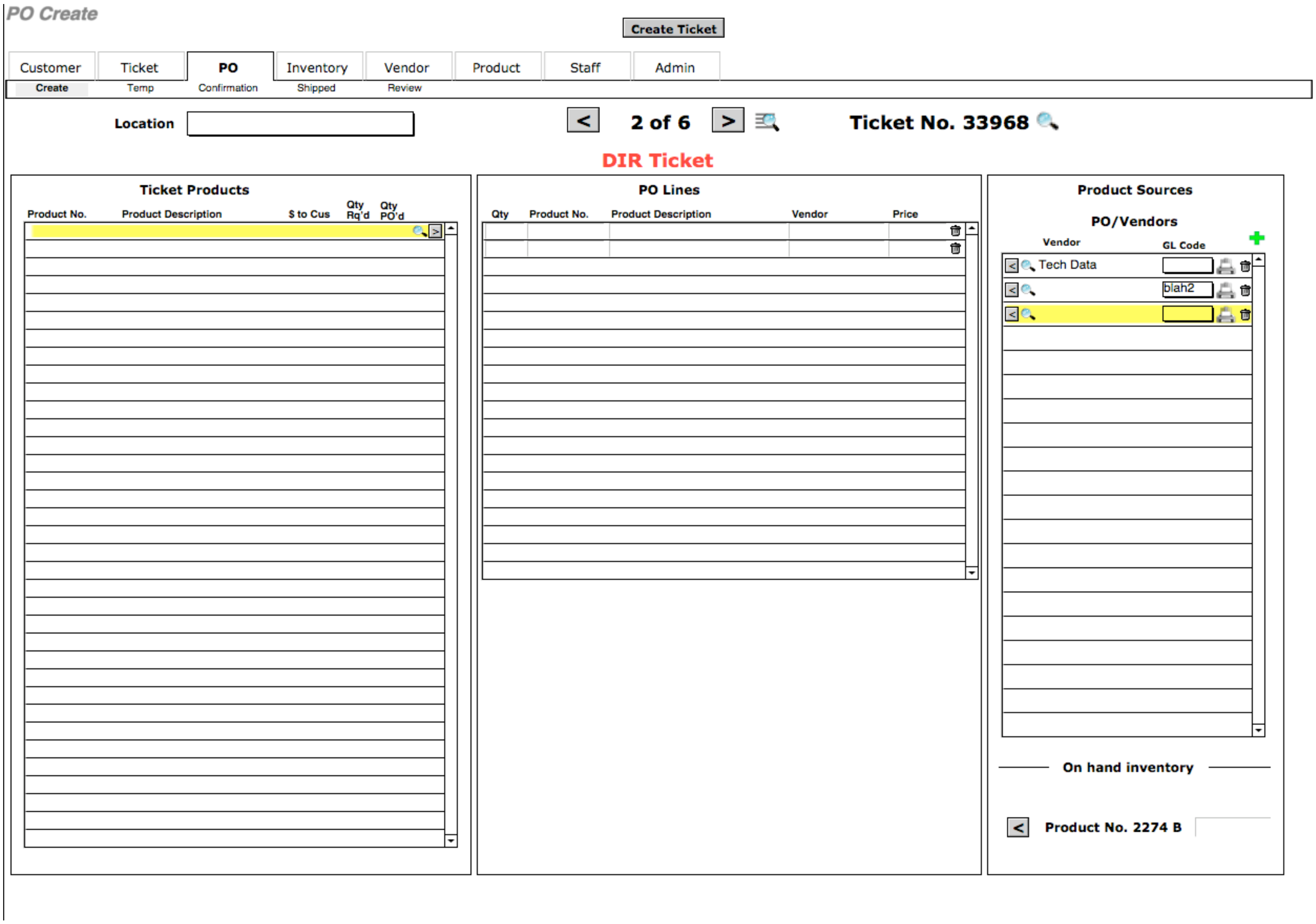
Installer Signature ______________________________ Date Completed: _______

Customer Signature ____

Product List	This is a list of all parts for the ticket; it wouldn't go out unless all parts were on hand, either already in inventory or from a PO
Upper right company info	Comes from the database, for the location that issued the ticket
Bottom stuff	This is all just pasted on the layout, and meant to be filled in by hand

Wire Frame Report

PO Create nav

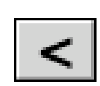


First Nav to Screen Within a session, when the user first navigates to this screen, it causes a search for tickets with a status of "PO", which is the found set, sorted by ticket number, and begins on record 1 of that found set.

No Records Found Instead of this screen, a screen is displayed which says, there are no tickets needing PO's at this time

mag glass/Ticket No. pops up a window with ticket and customer details

Nav tickets Navigate forward and backward through the found set of tickets



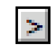
Ticket Products A list of products needed for a ticket. The qty Rq'd is the quantity requested to fulfill the needs of the ticket; the Qty Ord'd is the quantity alloted to the ticket in PO lines on this screen, added up, for that product

Wire Frame Report

PO Create nav

mag glass/ ticket products selects a product line for the ticket. Hilites the portal, and all arrows in the portal disappear and become nonfunctioning. Arrows appear in the PO/Vendor list, and the On hand Inventory section appears, with the selected product's inventory levels showing. These levels reflect current inventory AND items allocated via this screen that have not been moved from temporary status. Any PO lines for ANY PO for ANY vendor show in the middle PO line portal for that ticket/product line that is selected.

arrow/ticket products Appears when a PO/Vendor has been selected. Creates a PO Line in the middle for that product for the selected vendor. Sets the cursor in the Qty field for the newly created PO Line record. It autoenters the Qty needed to make the Qty Ord'd equal to the Qty Rq'd for the clicked Ticket Product, and when the cursor is in the Qty field at the conclusion of the script, the contents of the field are all selected.



ticket products portal sorts by product number; rows still requiring source allocations (the Qty Rq'd > Qty Ord'd) hilite red, unless it has been actually selected with the magnifying glass, in which case it hilites yellow. If the Qty Rq'd = the Qty Ord'd, the row hilites green, unless it has been selected with the magnifying glass, in which case it hilites yellow. The product description has a tooltip which pops up more info only if it has truncated. Also, no fields in the portal are editable, and a normal click selects the row, whereas a shift click serves to move the item to a PO line, the same as clicking the arrow.

PO lines portal The Qty field is editable, all others are not enterable. If it is on hand inventory, it reads "Inventory"

trash can deletes a portal row; for PO lines, deletes that PO line record; for PO/Vendors, deletes that PO, and cascade deletes the PO lines associated with it.

arrow/PO/Vendors appears only if a Ticket product line has beeen selected with the magnifying glass, otherwise simply does nothing. When clicked while active, a PO line is created for the selected ticket product for that PO for that vendor, and the cursor lands in the Qty field of the new PO line record. Shift click anywhere on the portal that is not otherwise occupied by a button does the same thing. It autoenters the Qty needed to make the Qty Ord'd equal to the Qty Rq'd for the selected Ticket Product, and when the cursor is in the Qty field at the conclusion of the script, the contents of the field are all selected.

mag glass/ PO/Vendors selects a PO/Vendor for the ticket. Hilites the portal, and all arrows in the portal disappear and become nonfunctioning. Arrows appear in the Ticket Products portal list. PO lines for that selected PO which has been assigned a vendor appear in the PO Lines portal in the center of the screen.

PO/Vendors Vendor field editable; drop down value list which uses type-ahead to select a vendor.

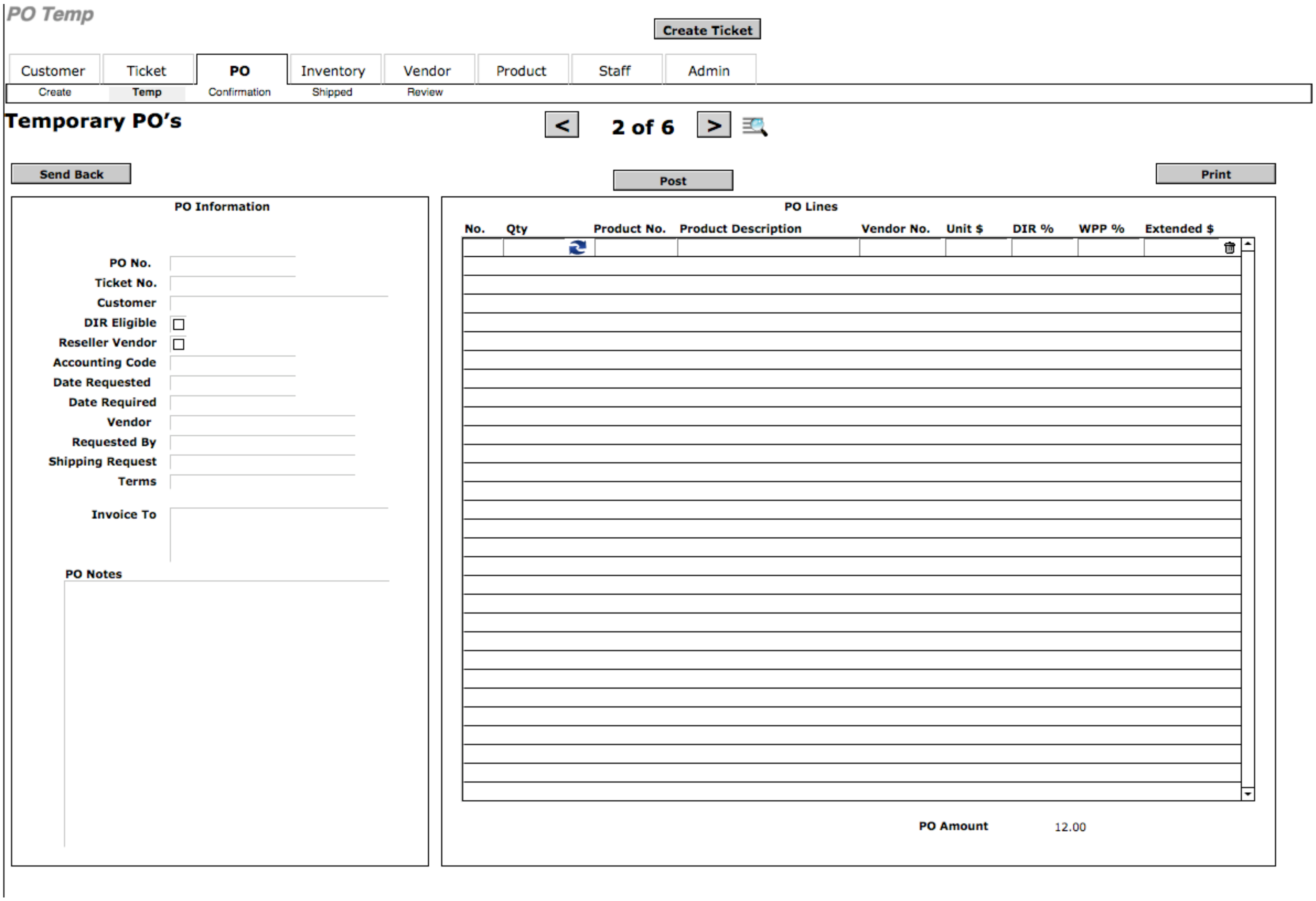
Wire Frame Report

PO Create nav

Print Icon	first selects the PO as if the magnifying glass icon had been clicked. Then prints the PO to the user's default printer for review without a dialog.	
Add PO button	Creates a new portal row record in the PO/Vendors portal, auto-selects it as if the magnifying glass had been clicked, and enters the cursor into the vendor selection field, which pops up the value list.	
On hand Inventory	This section disappears if a PO has been selected; The Qty field is uneditable and reflects the current free inventory for a selected Ticket Product minus any PO Lines temporarily created via this screen. Inventory received that is tagged for a specific ticket is NOT included in this total, only inventory received that is not tagged for a certain ticket is included in this amount. The Qty is filtered to the selected location, and cannot be altered to show all inventory for any location.	
arrow/On hand Inventory	Creates an orphaned PO line record (it is a line which is not connected to a Vendor PO). The Vendor field in the PO Line portal will show "On Hand Inventory". Once clicked it creates a PO line entry for the selected Ticket Product, and enters either the Qty Rq'd for that line if there is enough on hand inventory, or else enters all the rest of the on hand inventory.	
View List	Pops up a window of a list of the found set of tickets, with info peculiar to the creation of PO's in the list.	
View Ticket Details	Pops up a window with certain details about the current PO	
DIR flag	shows if the current ticket has DIR flag turned on.	DIR Ticket

Wire Frame Report

PO Temp nav



Post sets the status not temporary (posted); also sends it as an email to vendor

WPP$ looked up from the product catalog table

WPP% manual entry, auto-enters from last visited record; "9" means .09, 9%

**unit$** wpp$ * wpp%

THERE SHOULD BE A GLOBAL SETTING FOR THE STANDARD WPP DISCOUNT (RIGHT NOW ITS 9%)
WPP$ IS PULLED FROM THE NORTEL PRODUCT CATALOG, SAME FIELD
WPP% IS PULLED FROM THE GLOBAL SETTING AS JUST INDICATED ABOVE
UNIT$ - THIS VALUE IS WPP$ *(1-WPP%) WILL NEED TO CONVERT % TO DECIMAL, EX 9% IS .09
EXTENDED $ IS UNIT$ * QTY

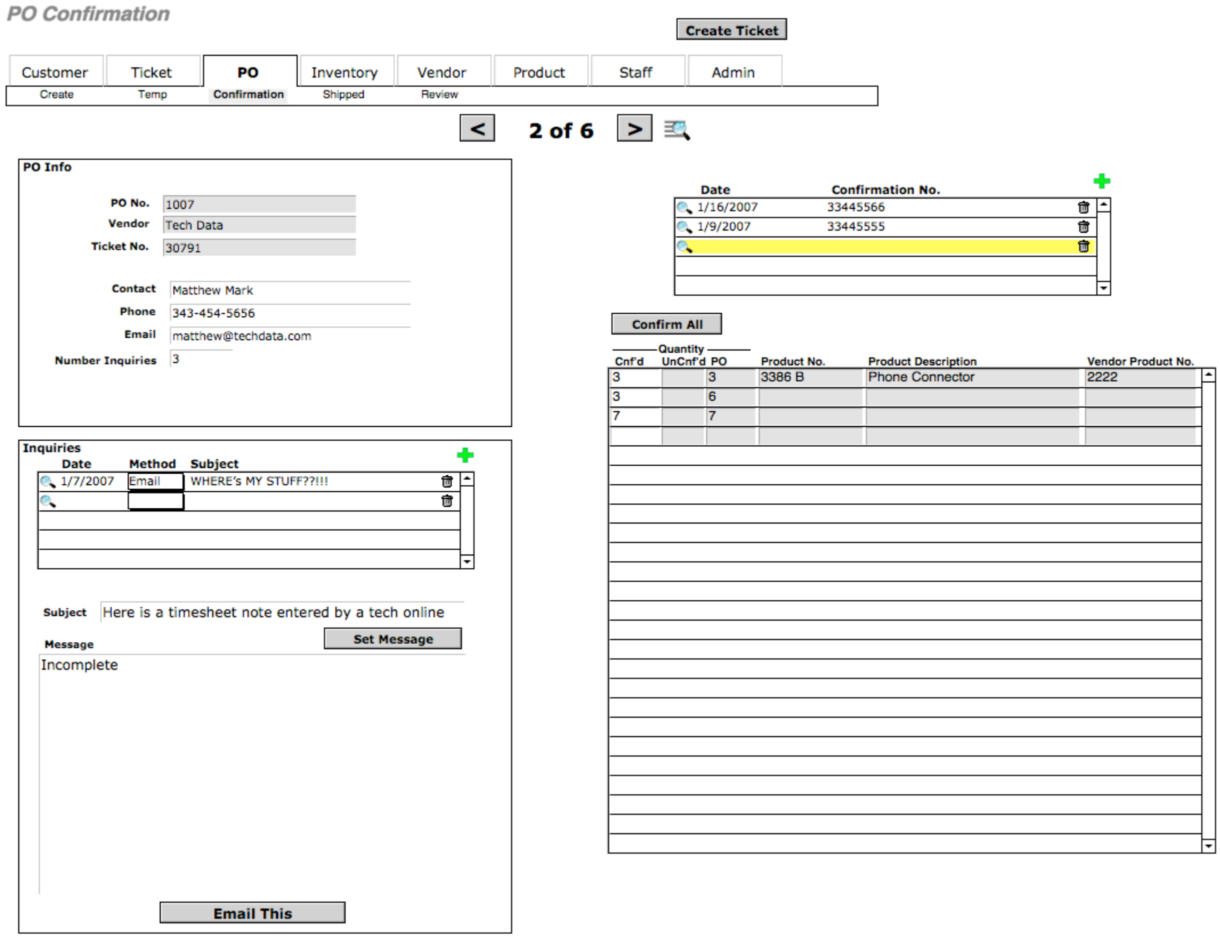
Wire Frame Report

PO Temp nav

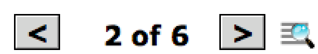
DIR Eligible	shows this from the ticket, but not editable.
Ship to	auto-enters for location, but can be overwritten...
Provider	this is actually from the customer table; if not checked, the customer field looks up the customer and site names, and address; if checked, it blanks this out and someone types it in manually here
shipping request	auto-enter “best way”
terms	auto-enter net 30
ship to	auto-enters for the ticket’s office location, but can be overridden
Post	changes PO status, and creates PDF of PO; creates email in local machine’s email client with attachment.
Requested By	dropdown list of all staff; can be overridden manually; enters a textual value, not relational key

Wire Frame Report

PO Confirmation nav



Navigation When you first navigate to this layout in a session, it finds the list of PO's that are open that have not been completely received, and establishes that as the found set.



List Popup Window Clicking this icon pops up a window with the list of open unconfirmed PO's

Send Back If a certain item is not going to be confirmed, it can be sent back to the ticket and reallocated to a different PO for a different vendor

Set Message automatically creates an inquiry message, with a subject which references the PO no., and a message which references the all the line items and quantities in the PO, and the expected arrival date as well as the PO date.

Email This Creates an email with the subject and message indicated. It also attaches a PDF to the email of the PO and sends the email via the local user's email client, NOT SMTPit.

Trash Can deletes a history item, incase something was added by mistake

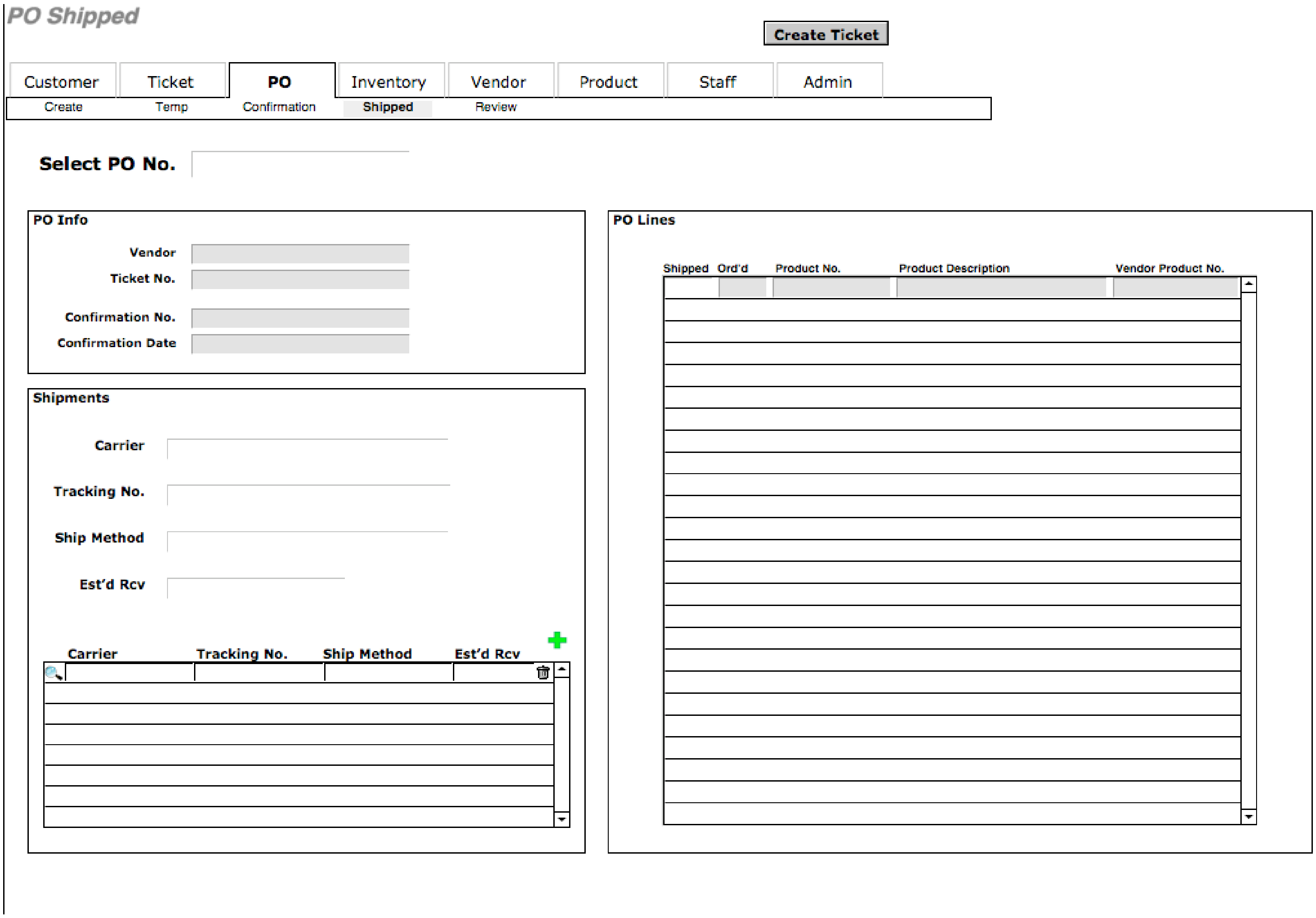
Wire Frame Report

PO Confirmation nav

History portal	hovering over a subject causes a tooltip with the message to pop up.	
Add History Item	Creates a new history item, takes user to the message tab to fill in the details. Also has a menu item and key command on this layout for this function.	
Inquiry mag glass	selects an inquiry to see its details directly below	
send email	goes through local machine client, not SMTPit; creates PDF of PO and creates email but doesn't send it, presents it for further editing before sending.	Email This
select confirmation	once selected, the numbers in the cnf'd column under the lines change to reflect the values entered only for that confirmation. These values start off blank, and are entered via a create relationship.	
confirm all	Sets the unconfirmed qty into the cnf'd qty for all lines; afterwards, the uncnf'd qty will all be 0.	Confirm All
Add Confirmation Record	adds a record to the portal, navs to the new record, leaves cursor in the confirmation no. field, auto-enters today's date	
Set Message	sets the message from default text according to the admin/global page setting	Set Message

Wire Frame Report

PO Shipped nav



Select PO No. Drop down list of open PO's with product yet to ship

PO Info Fills in automatically, uneditable

Shipments Large fields at the top are initially blank, and typing into them automatically creates a new shipment in the list below and selects it.

Add shipment Adds a new shipment line, selects, and makes it the active fields for editing above. Not needed unless two shipments are entered in the same user session for the same PO.

select shipment hilites portal row, makes the data in that row's fields visible and editable above, and shows the quantities shipped for that shipment in the PO line portal to the right.

shipment portal row none of these fields are editable

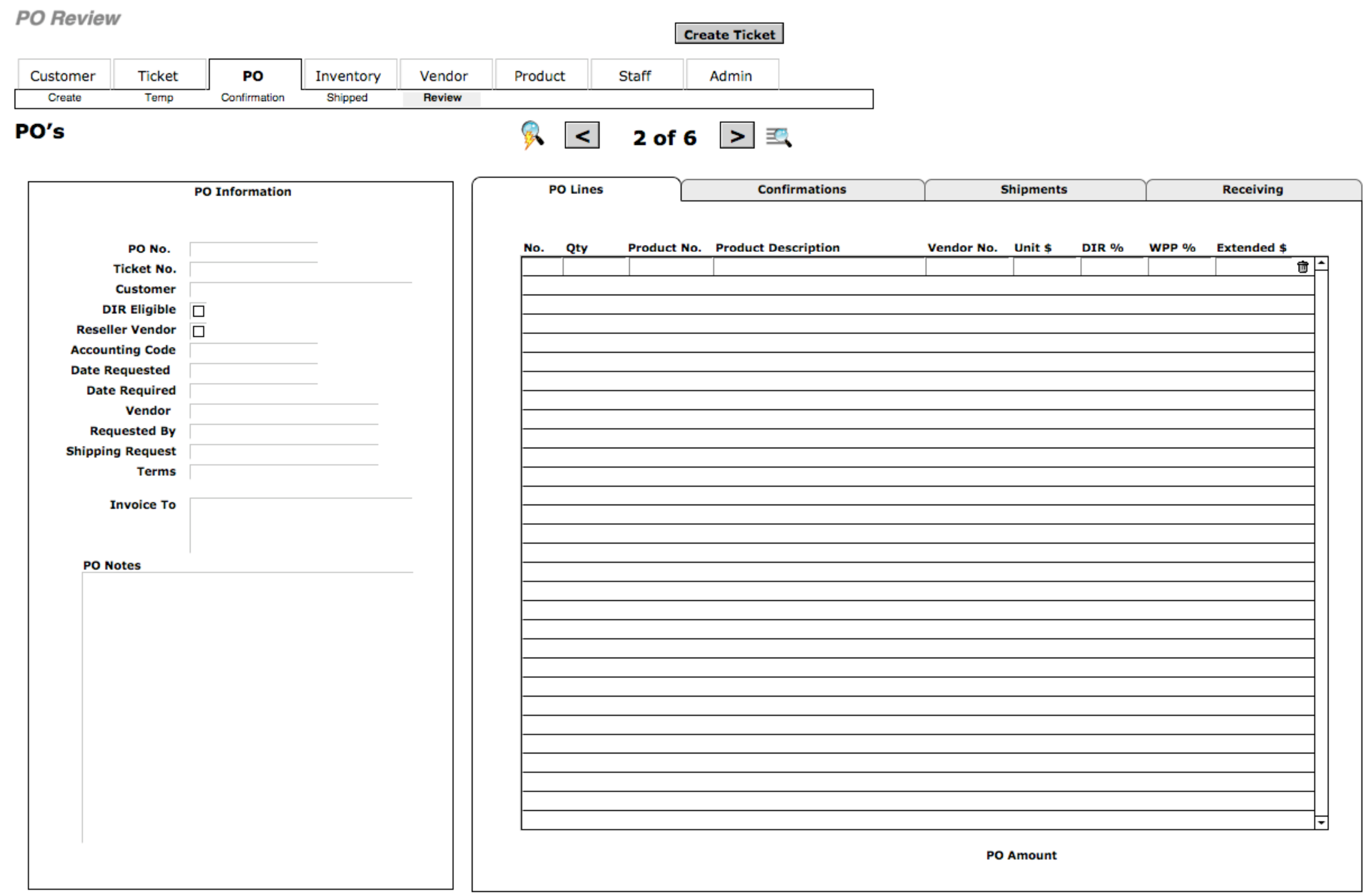
Wire Frame Report

PO Shipped nav

delete shipment portal row	doesn’t allow deletion if not created in the same session as the current one.Pops a modal dialog confirming desire to delete. Selects most recent shipment if any.
PO Line	Only the “Shipped” field is editable, and is unique to the selected shipment. The others are from the PO lines as entered, and are uneditaable.
Conf#	Value list of conf# for PO; ship from conf autoenters same qty’s as that conf set.

Wire Frame Report

PO Review nav



Initial found set all records for logged in person's location; if admin, shows all. unsorted.

Date Required is this

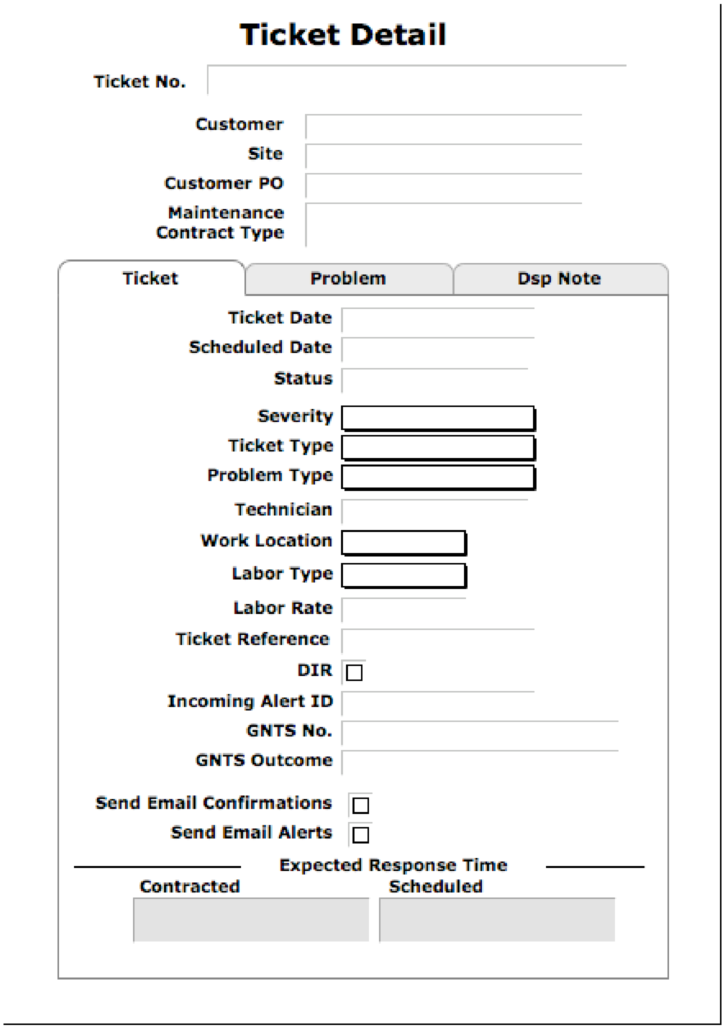
Wire Frame Report

PO TicketList pop

layout comments	This is a list view based on the same TO as the PO Create table; It is a list view, not a portal; when opened, resizes down automatically appropriate to the number of rows required.
List row	No fields are editable; clicking a row closes the popup window and takes you to that record in the main screen under the PO/Create tabs
Date	This is the ticket creation date
Prd Qty	This is a composite calculation per ticket of the number of ticket product lines still needing allocation of PO lines or inventory
completed	this means that all ticket product lines have had products either allocated from inventory or assigned to a PO
options for layout	no find view; not in table view; simplifed menu set

Wire Frame Report

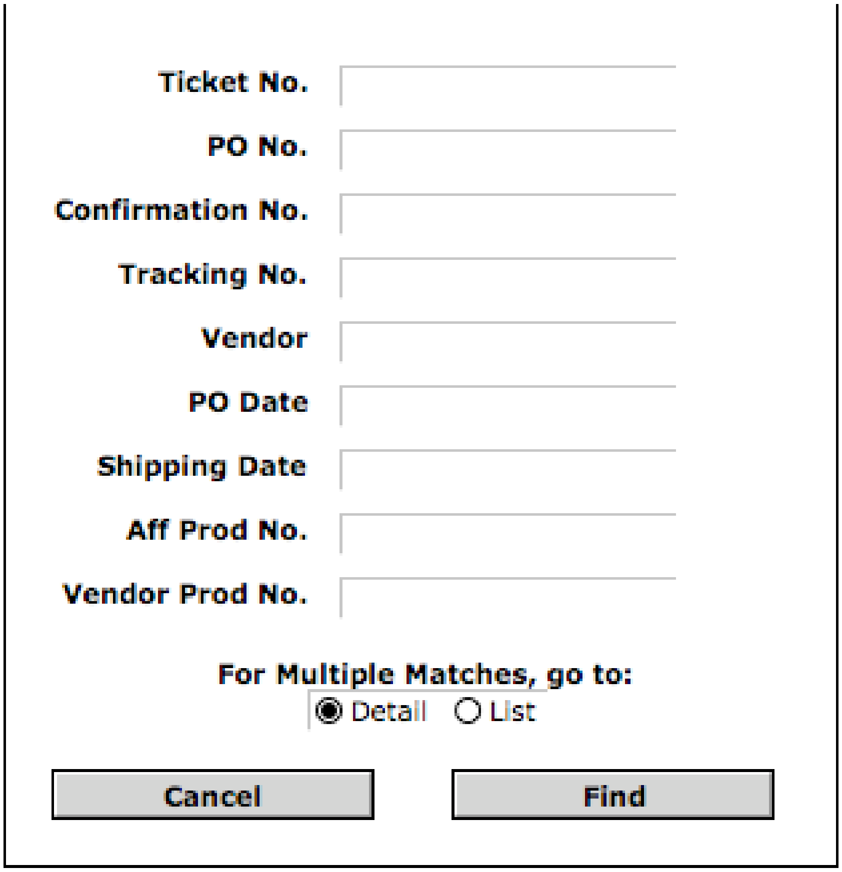
PO TicketDetail pop



(No Notes)

Wire Frame Report

PO Find pop



Cancel Closes window, returns to original screen

Find If only 1 match, goes to original screen with that one record showing and only it in the found set. If multiple matches, if the detail is selected, closes the window and goes to the original window with the matching records in the found set, and record one showing. If List is selected, stays in the same popup window but goes to the PO list selector popup window.

Wire Frame Report

PO Temp print

PURCHASE ORDER

Charge Account Number	Requested By
33698	Terri Huxley

Affiliated Telephone, Inc.
730 Avenue F, Suie 210
Plano, TX 75074
972-423-4222 - Voice X4003
972-422-9867 - Fax

PO#: Affiliated Telephone, Inc.

Job # Name: Critical

Req #:___________

Date Requested	Date Required	Shipping Inst:	Terms
Tue, 1/2/2007		Dallas	NET 30

Vendor Name:

Invoices To: SEE ABOVE

Ship To: SEE ABOVE

☐ **Tax Exempt** ☐ **Taxable**

No.	Qty	Part Number	Description	Unit Cost	Total Cost
Detail	12	740-50030-01	8 Channel IDVR	1,395.00	11,160.00
Detail	12	740-50030-01	8 Channel IDVR	1,395.00	11,160.00
Detail	12	740-50030-01	8 Channel IDVR	1,395.00	11,160.00
Detail	12	740-50030-01	8 Channel IDVR	1,395.00	11,160.00
Detail	12	740-50030-01	8 Channel IDVR	1,395.00	11,160.00

Vendor Order #: **Please Confirm Receipt** **29,227.00**

Confirming To: **On:** **By:**

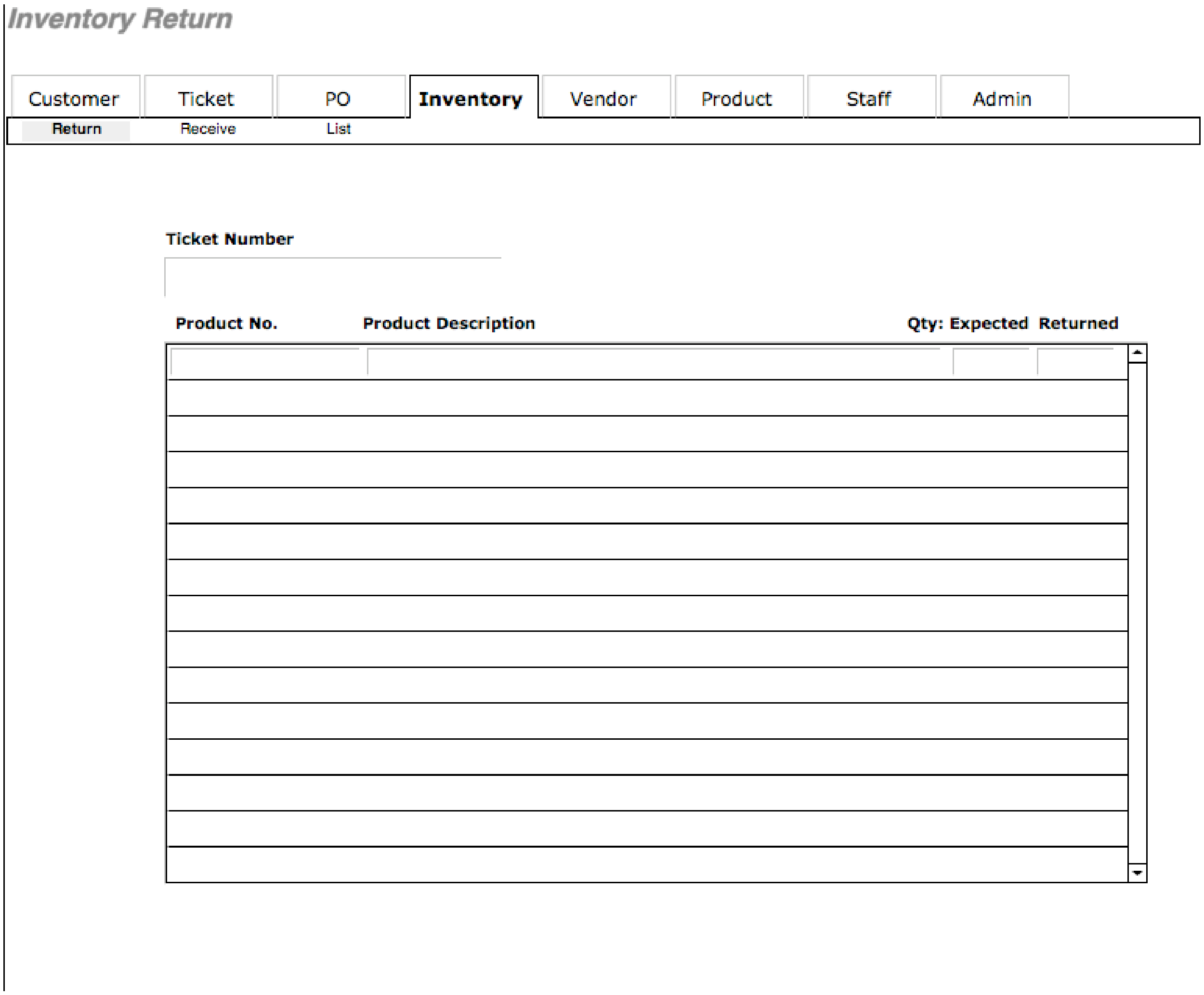
Via:

SIGNATURE: ______________________________

Layout Explanation	This is a list view layout based on the PO Temp line item table. The header info we see here is in a Title Header; there will also be a smaller normal header which will show only the PO# and ppage number
Customer is provider	If the customer for the ticket is a provider (billing_provider = 1); hide all customer information on this form

Wire Frame Report

Inventory Return nav



Ticket Number A drop down type-ahead Value List, filtered to tickets that are in the status of Dispatched, Incomplete, or Completed, and have unreturned but expected equipment.

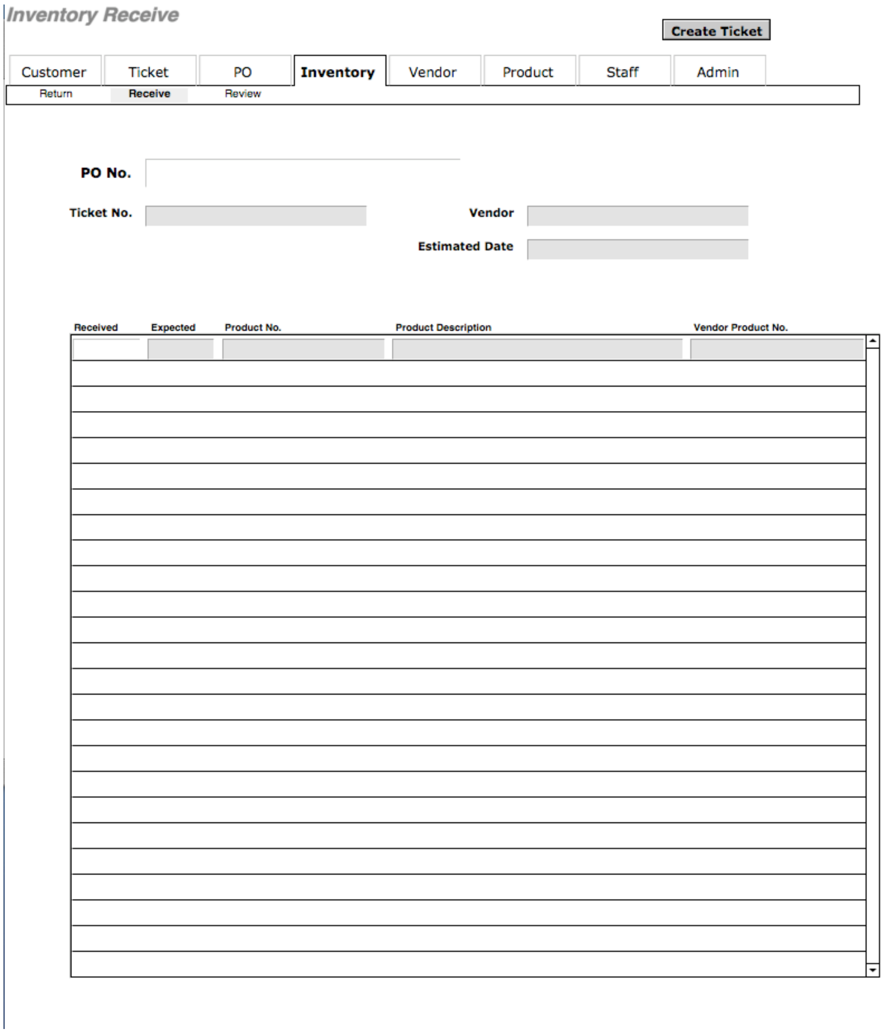
Product portal Only the Returned Qty field is editable; it is a create relationship to teh inventory table for this ticket, lline item, and date.

Date not shown here, it is always today.

Bad If bad, doesn't enter it into inventory

Wire Frame Report

Inventory Receive nav



Tracking No. Drop Down Value List, type ahead, filtered to shipments that have been entered but not received

PO lines Only shows the lines expected on that shipment; teh expected number is not the PO qty, but the expected to ship qty from the PO/Shipped screen. Numbers entered here automatically go into inventory for that product.

Ticket status changes If all product for a ticket has now been received, a change in the ticket status is triggered to “Ready”, placing it in the dispatch queue.

Use PO No. as lookup Jan 16, 2007 Rudy: all shipments don’t get track no’s, and they care more about tying it to a PO than a shipment.

QB integration enter shipments into QB with PO info reference so it will know what is being paid for on an invoice from vendor...

received background is gray if all is received, and value cannot be edited; background is white if editable.

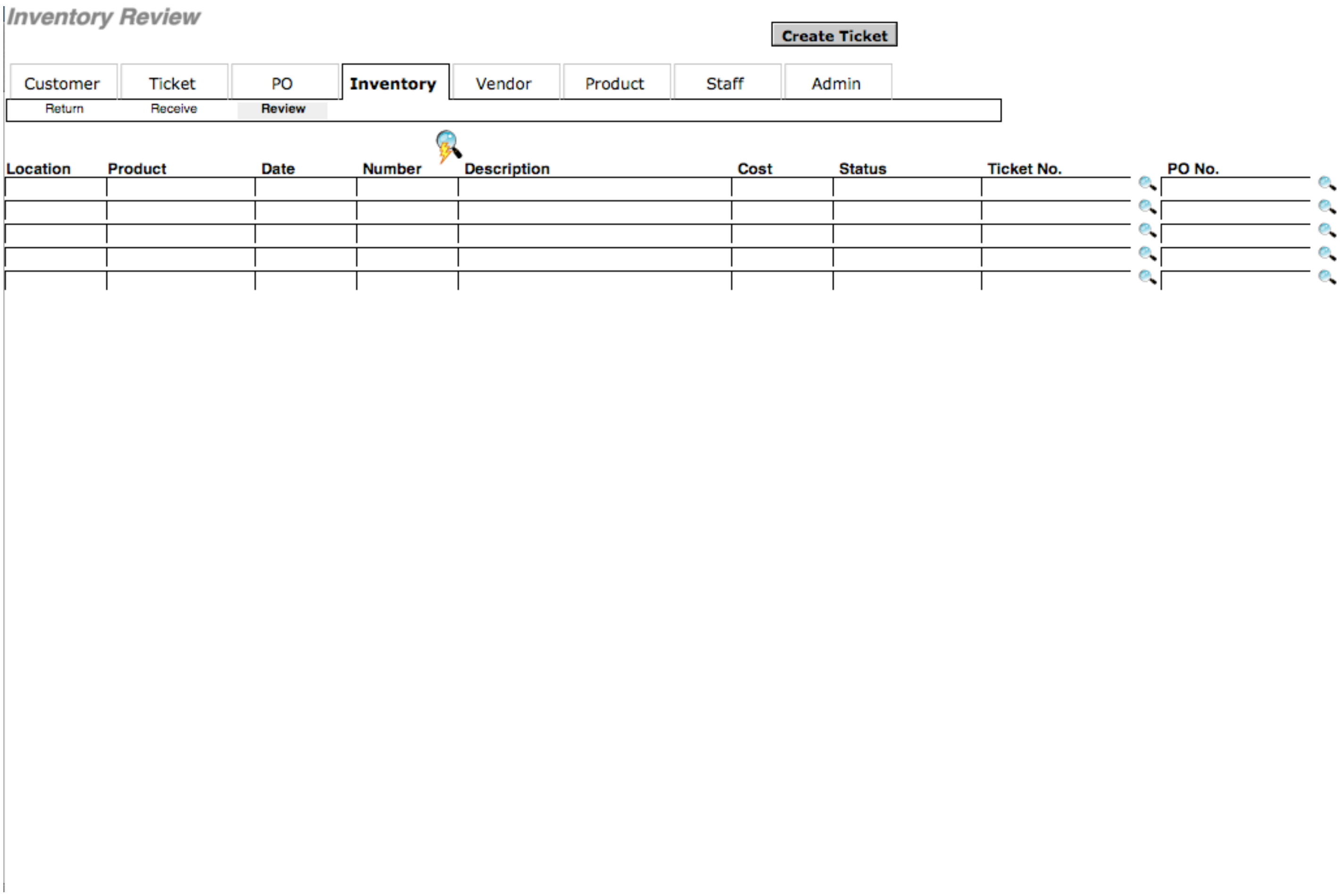
Wire Frame Report

Inventory Receive nav

PO type	If the PO is linked to a ticket, the inventory is logged only against that ticket, and is not available as general inventory; if it is a PO created independently of a ticket, it enters general availability as inventory for any ticket.

Wire Frame Report

Inventory Review nav



Initial found set all records, sorted by date descending, for the logged in person's location; if admin, shows all records

Status Refurb, Bad, New

Cost Looks up cost from the product table

Free inventory If it is not connected to a ticket, it is free inventory. If it is bad, it does not belong to free inventory. If it comes back repaired, it is refurbed.

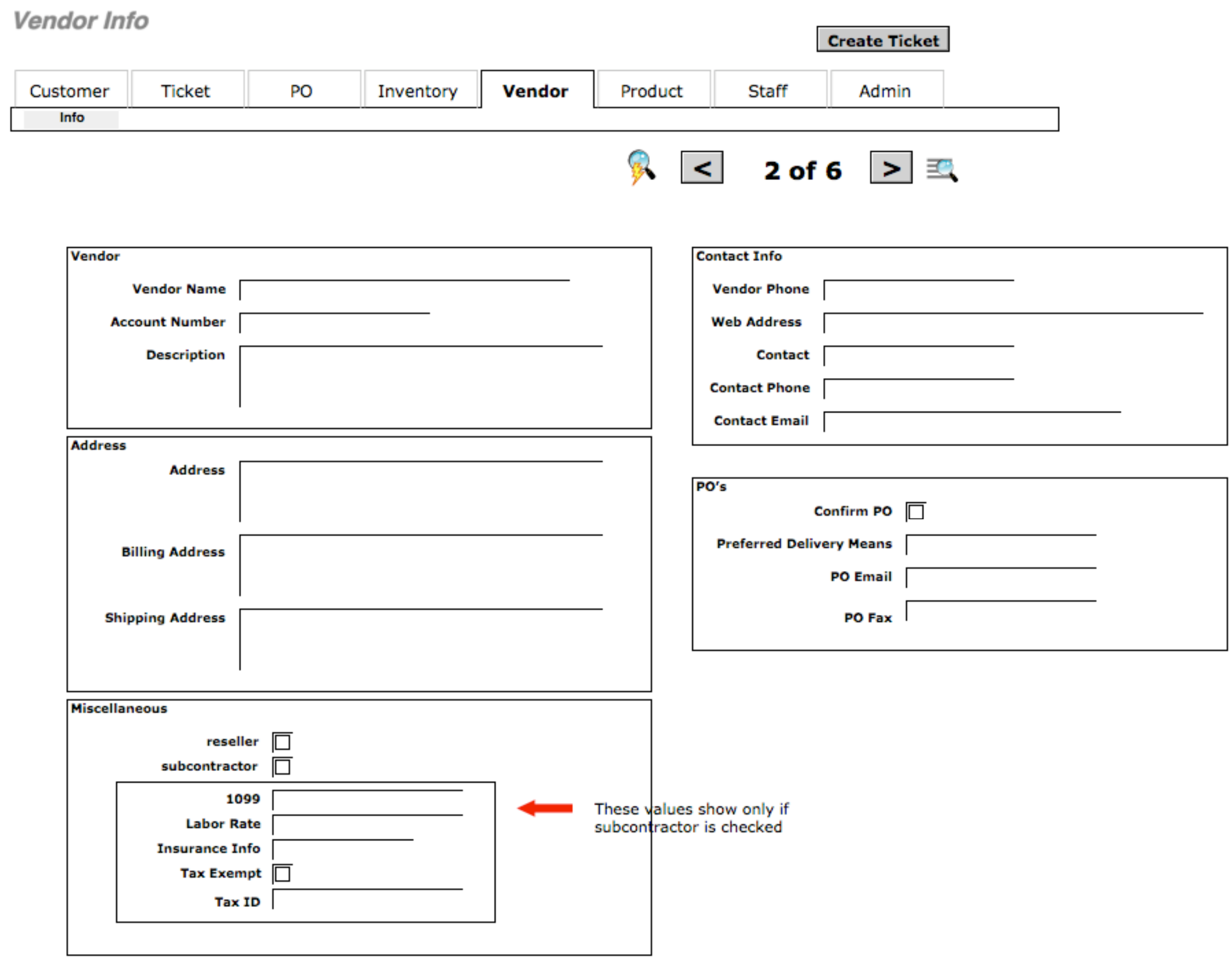
Wire Frame Report

Inventory Find pop

(no comment)

Wire Frame Report

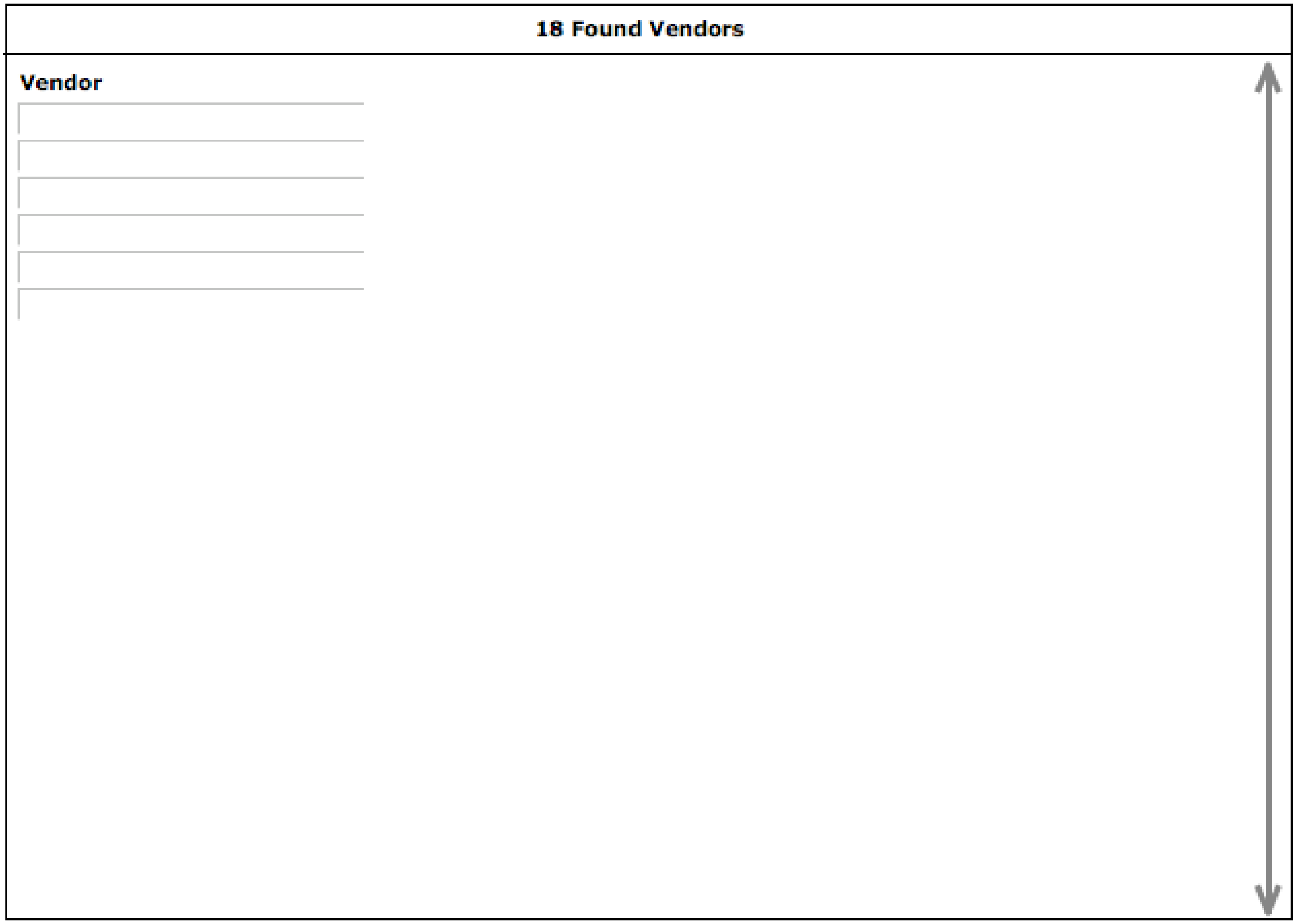
Vendor Info nav



initial found set show all records, unsorted (creation order)

Wire Frame Report

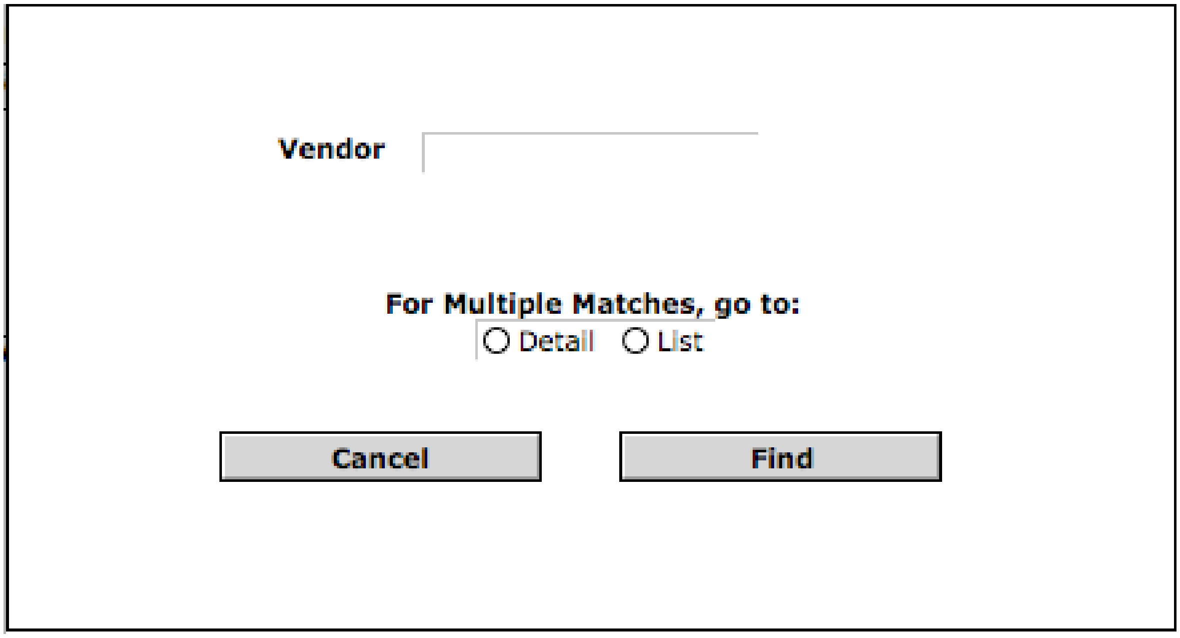
Vendor List pop



Q: list fields Do there need to be more fields in list view beyond just the vendor name?

Wire Frame Report

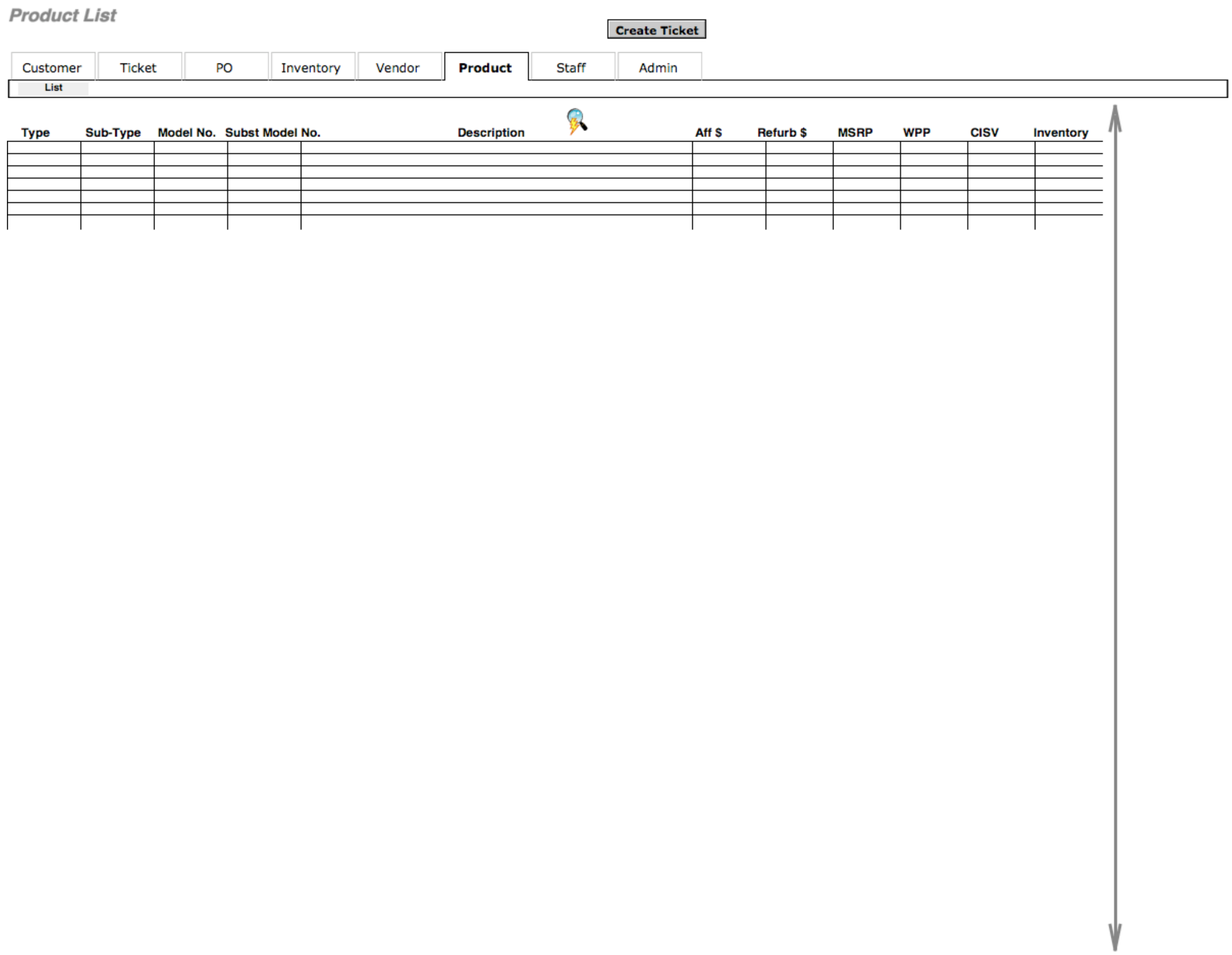
Vendor Find pop



search fields Do there need to be more fields to search on for vendors?

Wire Frame Report

Product List nav



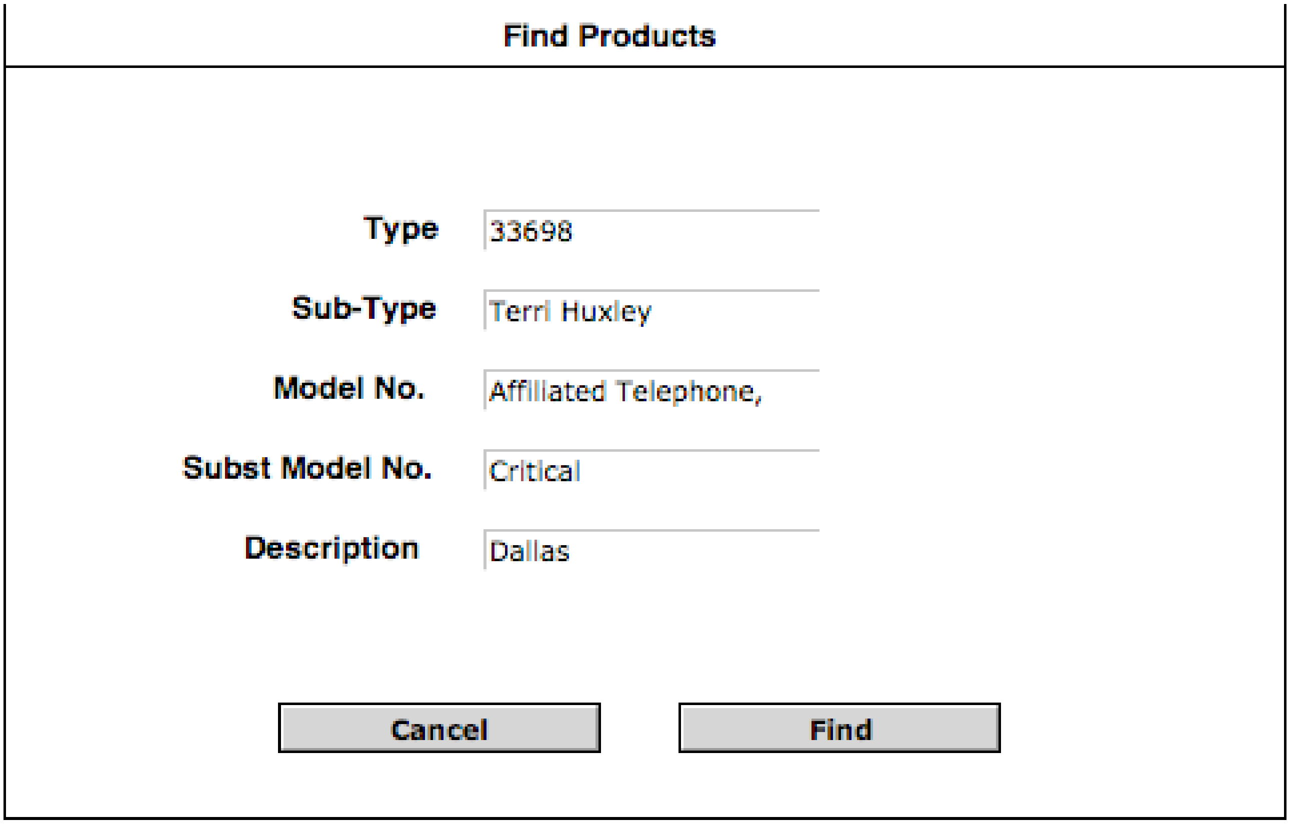
initial found set all records, unsorted

sub-type A value list, type-ahead drop-down, based on values in the field itself.

Inventory This means, in inventory, FREE from ticket association. If Product has arrived that is meant for the fulfillment of a ticket, it does not figure into this number.

Wire Frame Report

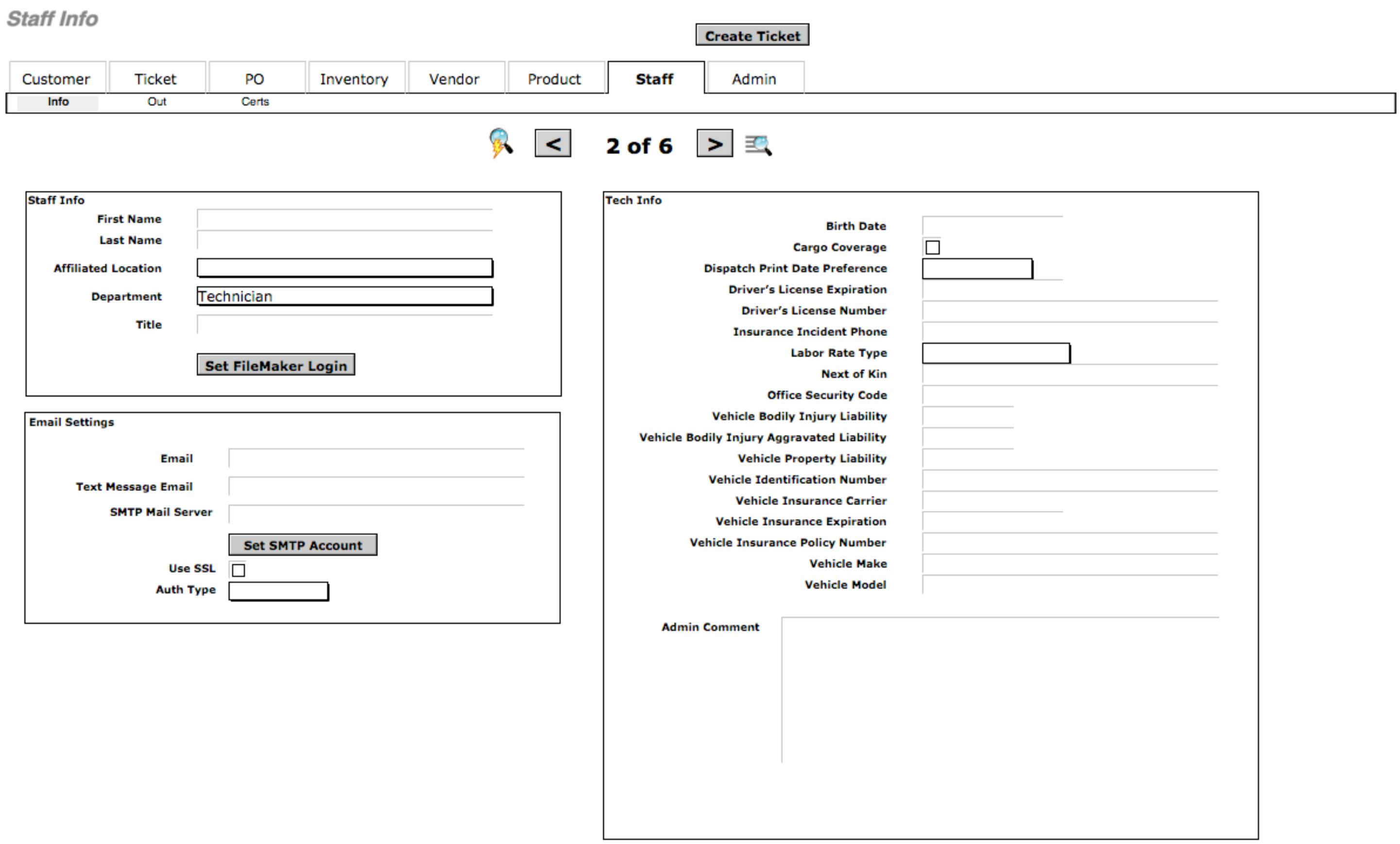
Product Find pop



(no comments)

Wire Frame Report

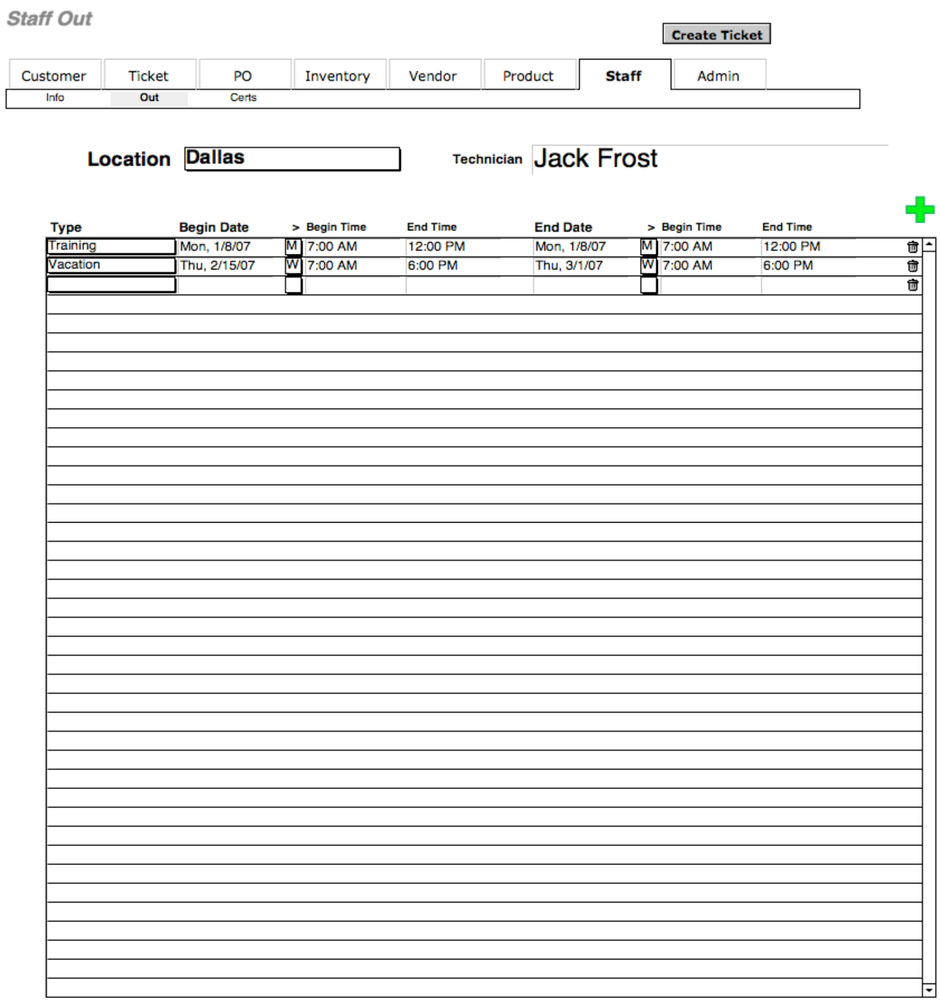
Staff Info nav



Set login	pops a modal dialog with a user and password field to reset the user's account and password. Sets the privilege set based on the department
Set SMTP account	pops a modal dialog with a user and password field to reset the user's email account and password.

Wire Frame Report

Staff Out nav



Location Chooser	New session login auto-enters user's default location; hidden except for Dallas admin Op Mgr and purchasing/accounting user
Technician Chooser	type ahead value list of active techs for the chosen location
add leave time	creates a new leave record for the selected technician, and goes to the new record, which is always at the top of the list, with the type popped up ready to choose. 
Begin and End date	pops up a calendar chooser
End Date	if blank, autoenters the same date as the begin date; if not blank, remembers the number of days between, and auto-enters a new date that is the same number of days between; Also, if training, auto-enters same date as begin, if vacation or sick, leaves it blank.

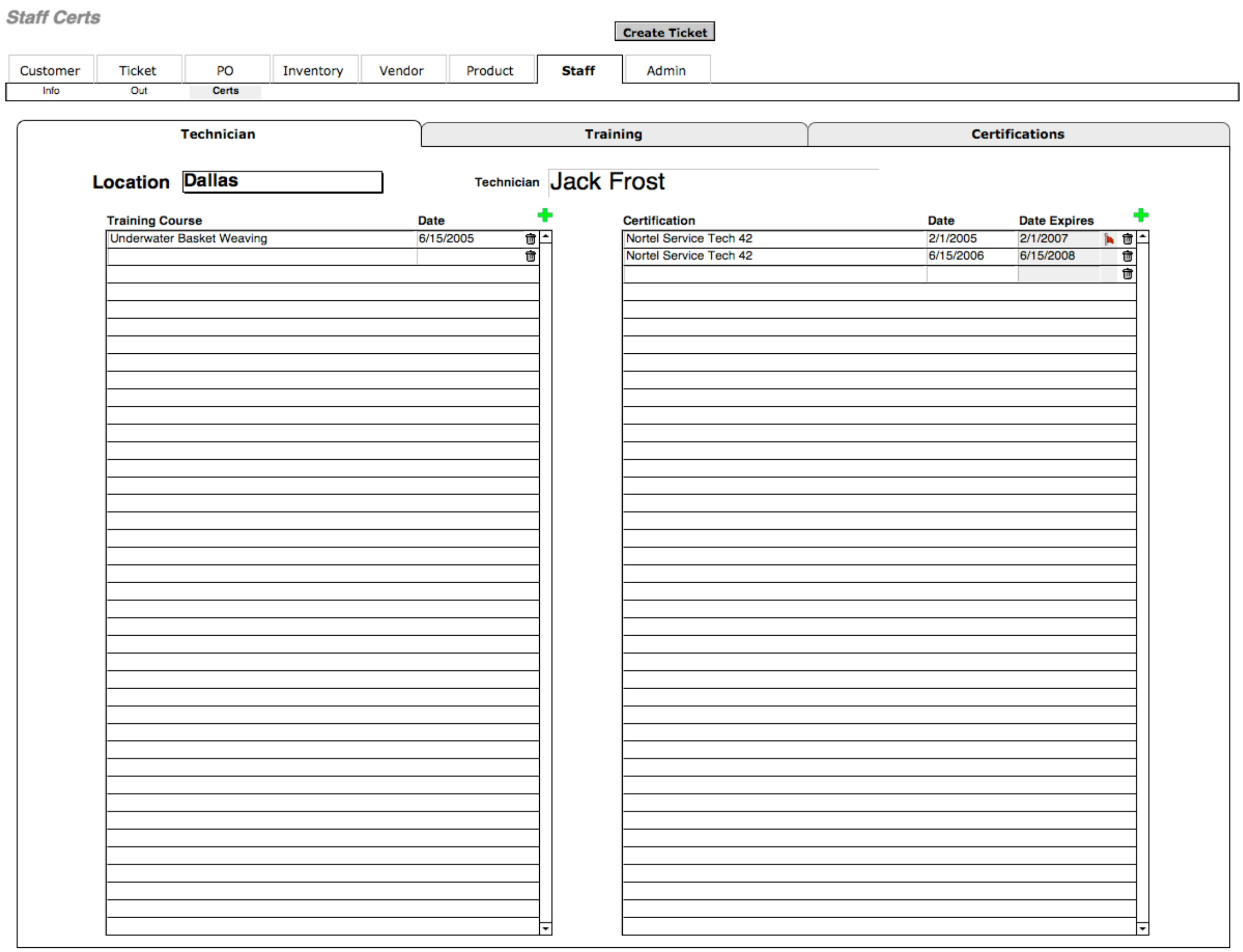
Wire Frame Report

Staff Out nav

>	whole day, morning, or afternoon; causes times to enter for begin time and end time in accordance with admin prefs for these selections; if dates are different and > is blank, auto-enters whole day	
> - end date fields	if the end date is the same as the begin date, autoenters the same value and causes the times to auto-enter; if different, auto-enters W	
Begin Time/End Time	Auto-enters values from the > selection, set by the admin in the admin section for these selections; can be edited	
delete	Only allows if the item is in the future	

Wire Frame Report

Staff Certs nav



Whole layout	defaults to the technician tab
training or certification/ add	adds a new training course record, selects it in the portal, and goes to the Training Course field in the detail area t the right
training or certification/ select	click the magnifying glass icon or anywhere on the portal row to select; hilites the chosen record and shows details about the course and attendees to the left.
training or certification/ tech/add	for the selected course, adds an attendee; once record is added, goes to the new portal row and enters the the tech selection field, which pops up a value list of staff filtered by which staff are techs for the chosen location; autoenters most recently visited record's date.
training or certification delete	checks to see if there are any related tech join records, and if so, aborts. Otherwise pops a modal dialog confirming intention to delete, then deletes record.

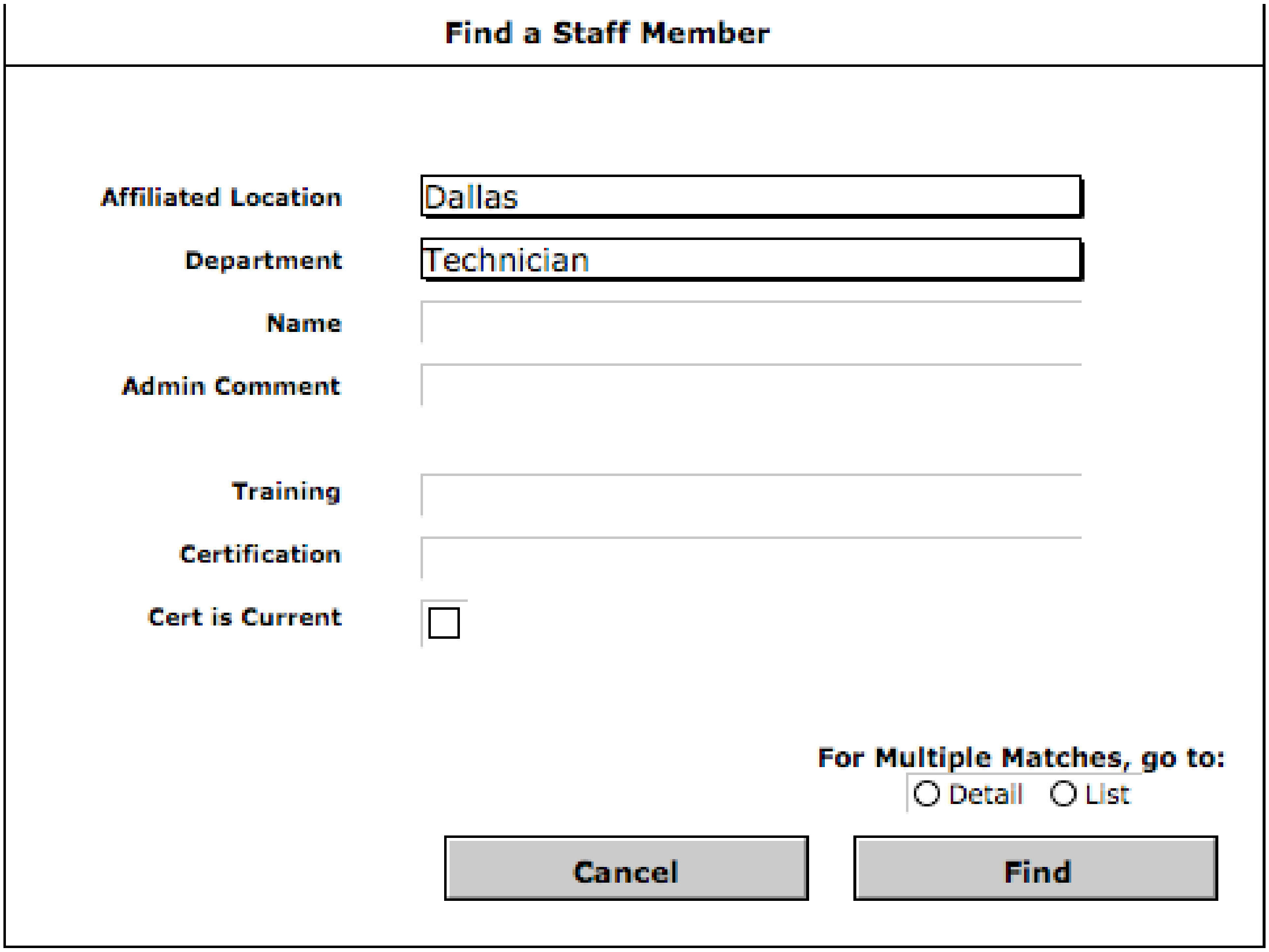
Wire Frame Report

Staff Certs nav

training or certification list portal	sorts with most recent tech assignments at the top, otherwise in creation order
Location Chooser	Auto-enters logged in user’s location; Appears ONLY for Dallas operation manager admin user; otherwise,otherwise hidden. This affects the filtering of the technician choosing value lists, and the number of current techs under training and certs.
Tech assignment delete	under any tab, doesn’t delete the tech, but the tech’s assignment to a training or certification. Pops a modal dialog confirming desire to delete, then deletes.
Certification/ Exp Mo’s	This means, the number of months before the expiration expires.
Technicians/ Tech chooser	type ahead value list filtered to active techs for the selected location.
red flag	indicates that a certification item will expire in 1 month or less; for certification recordds themselves, indicates that the current number will dip below the required number in 1 month or less. 
Certification/ Product selection	uses the same product selection schema as other screens -> drop-down type-ahead value list of either prod no. or prod descr., auto enters the other one

Wire Frame Report

Staff Find pop



Location Auto-enters logged in user's location; only appears for Dallas admin op mgr

Training/Cert Only appeear if Department = "Technician"

Wire Frame Report

Staff List pop

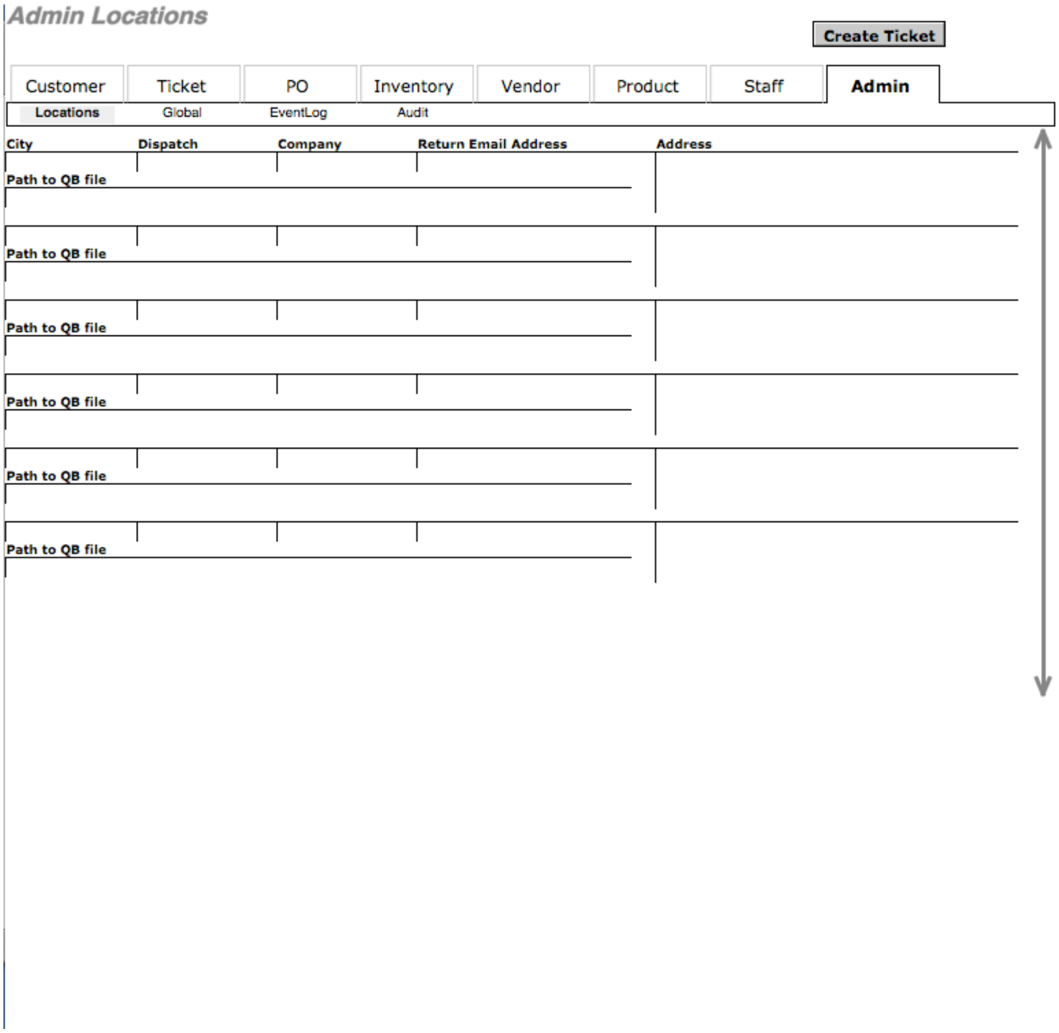
18 Found Staff Members

Location	Department	Name	Title
Dallas	Technician	Jack Frost	Senior Engineer
Dallas	Technician	Jack Frost	Senior Engineer
Dallas	Technician	Jack Frost	Senior Engineer
Dallas	Technician	Jack Frost	Senior Engineer
Dallas	Technician	Jack Frost	Senior Engineer
Dallas	Technician	Jack Frost	Senior Engineer

comments list view layout; click a row to select; selection closes window and takes you to the original detail screen with that staff member showing, with a found set like the list.

Wire Frame Report

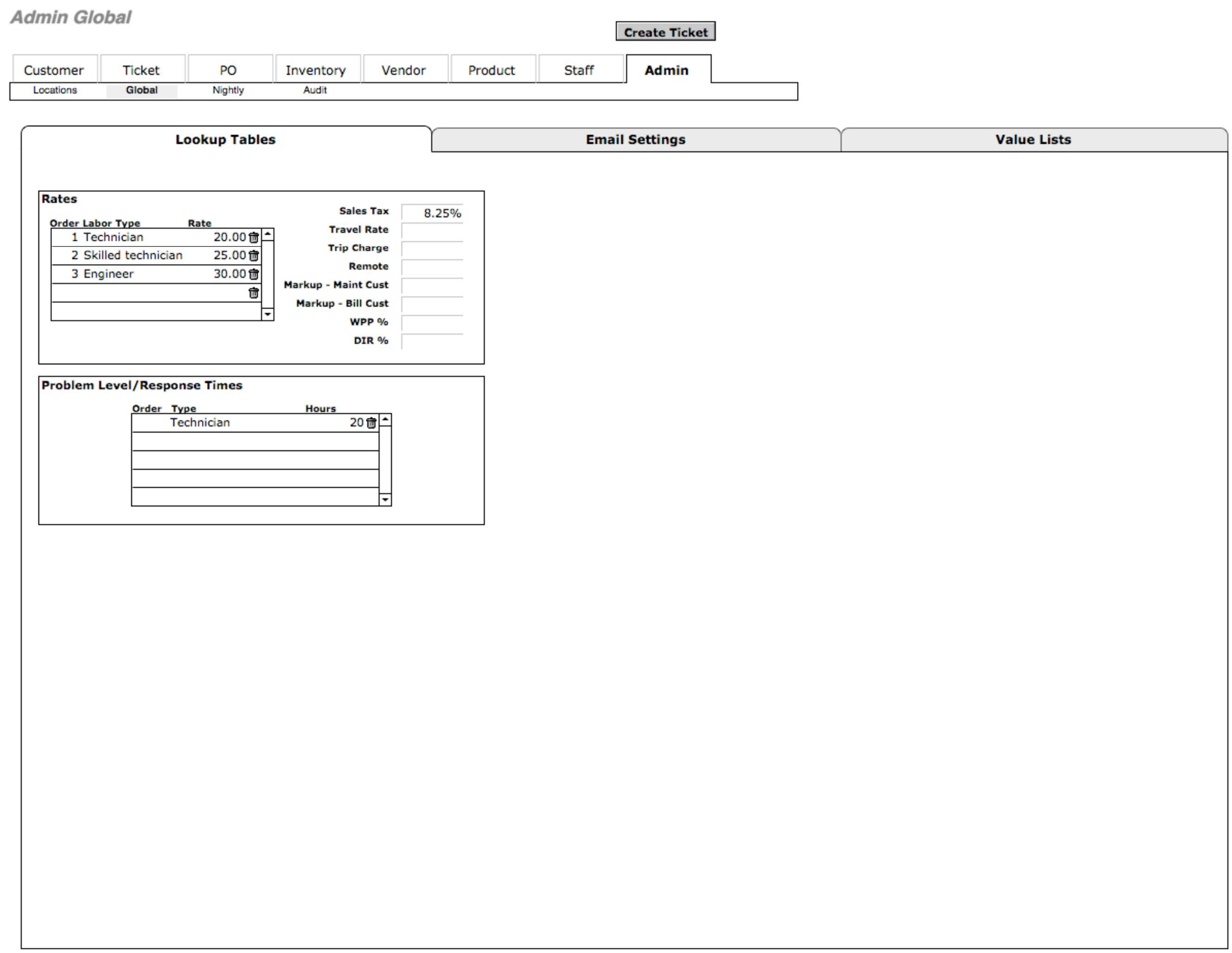
Admin Locations nav



initial found set	shows all, creation order (unsorted)
Dispatch	Are there situations where the dispatch city is different than the location's city? Do

Wire Frame Report

Admin Global nav



Email settings if User Settings is selected, the admin settings just below disappear; if Admin Settings is selected, they appear. Also, on the staff info page, if the admin settings is clicked, those options disappear from there as well.

VL notes: Departments This is pretty well built in, and should not be flexibly done in a table on this page

VL notes: how they work For popup menus, the real value entered in a value list is going to be the ORDER number. This is going to be set as unique per table. There will be a separate table per value list and lookup table. That way the value list will show show in the chosen order. Then the true value can be entered via the relationship. For dropdown lists, it will generally be a textual type-ahead list, which then performs a lookup to get the true value.

Resonse Time The requirements definitely seem to be asking for something additional here.

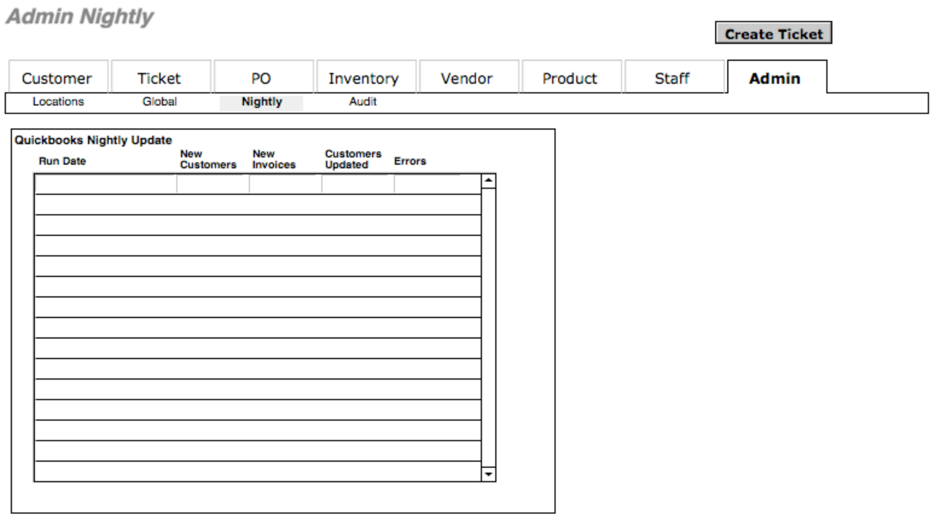
Wire Frame Report

Admin Global nav

Other value lists	If a value list doesn't show up here, it can be set as a normal set-in-stone value list. Remember that any value list that is editable will lose its user entered setting upon update unless it is set up as a table that can be imported.
Problem Level Response Times	This is a bit tricky. I haven't got it figured yet...

Wire Frame Report

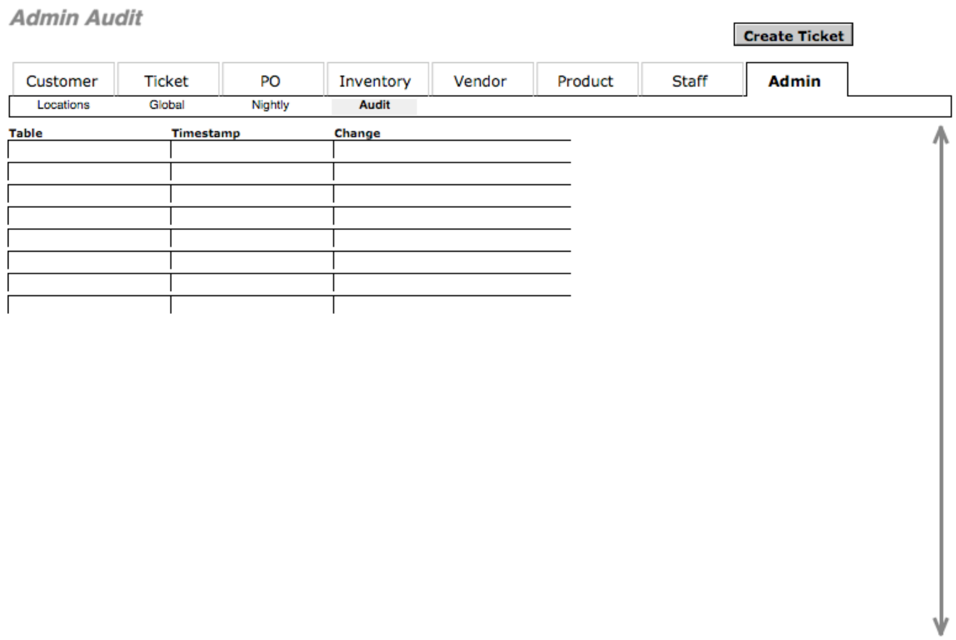
Admin EventLog nav



Nightly portal	sorted with most recent to the top; one record per day, shows statistics for nightly run.

Wire Frame Report

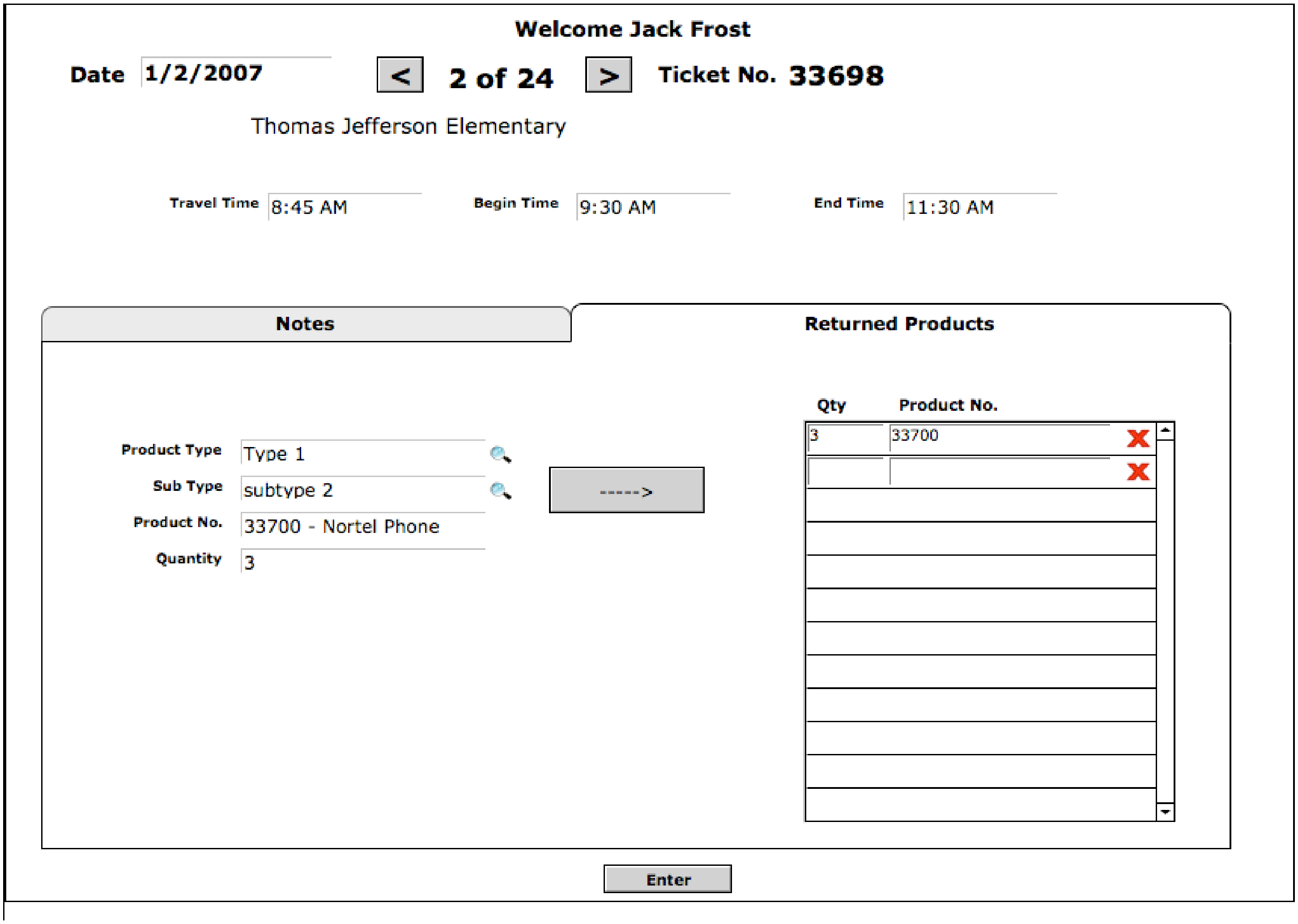
Admin Audit nav



initial found set	shows last 7 days of changes, sorted with most recent to the top.
description	this is a raw list of all changes made to all fields in all data tables in the database.

Wire Frame Report

Timesheet_Detail_iwp



IWP	This layout must work for Instant Web Publishing. The graphics may invert, and value lists must work correctly. When it is first navigated to, it must enter a field to force it into edit mode. Record navigation must accomplish the same thing
Date	Defaults to today, can't navigate to timesheets for more than 3 days ago. Also can't go forward past today.
Ticket No.	Non-editable
Site	Composite of Customer, and if different, the site, with a forward slash between them
Notes	tech notes specific to this time sheet
Return Products/Pr Type	A VL of all product types
Sub Type	Filtered VL of all sub types for the selected product type

Wire Frame Report

Timesheet_Detail_iwp

Product	Filtered VL of all products for the selected type and sub-type; VL also shows product descriptions out to 30 chars, but enters only the product number into the field
Arrow button	moves the selected product into the returned product list; also submits the form
Returned Product Portal	no fields in this are editable; they can delete records and redo them only.
mag glasses	submits the form to filter the next value list; if they go back and change the Product Type, it blanks our sub type and forces them to resubmit it. 
Rethink product entry	they will already know what the product number is, so have a way for them to simply enter that.