

This document has three sections:

Item Log (Fig 0a-Fig 0d)

Work schedule pages (Fig 1-Fig 7)

Contacts pages (Fig 8-9)

ITEM LOG

(this combines action/ issues/added value log)

The item log has a date picker and the user can sort the columns. On the left hand side are a number of filters. Rolling over the ‘icons’ opens up individual comments and ‘blue’ comment icons indicate that they are as yet unread by the user. (Ps. do we have search ability for this page? (like searching through comments/resolution/description, keyword)

clicking on ID number will allow you to edit the Item. To **create an item**, click on the “Add New Item” button. See Fig 5

Item Log-Default view is assigned to user logged in

Question: PID added in: is this correct that there are sometimes multiple ids?

New feature: Look in the Notes column. there is an icon to add a note [+] clicking on it will just take you to the individual item edit popup of Fig.5

Lombera Comments: To-Do lists for Resources.

1) This list will be prioritized by precedence of Highest to lowest risk and by due date (past due to X weeks out). Choose Risk level as the “sort by” option:

2) I'd like each item in the to-do list to link to the item-edit dialog. (The ID column names [blue] can be used as link to the item-edit popup (see fig 0c)

3) Also, as items are reprioritized and closed this list should update. (I agree: this is a programming ask)

4) the system will create an item comment when a user updates one of the items attributes. I request that the system incorporates a message format for system-generated comments that can later be used to sort and view only the system-generated comments about item attribute changes. In essence this would be come an Audit Log. (I think “resolution” can be included in comments. We can have a column “Audit” for system notes that is string searchable.) See below. Rolling over the bars will show you individual system comments. Or take you to the “audit log”.

Fig 0a Item Log

ITEM LOG

04 Mar

Start date:
04 Mar 2014

End date:

Sort by:
Date opened

Filter by:
Projects:
All

Item type:
All

Progress status:
All

Risk level:
All

Alert status:
All

Assigned to:
Myself

Search

Add new item

| PID | ID[s] | Alert | Type | Site | Keyword | Description | Risk | Progress | Assigned by | Assigned to | Created | Modified | Due date | Revised Due | Closed | Notes | Audit | Links | » |
|------|-------|---------------|-------------------|--|---|---|------|------------------|-------------|-------------|-----------|-----------|-----------|------------------------|-----------|-------|-------|--------------|---|
| 8001 | A001 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | Mary M. | George D. | 16-Mar-14 | 18-Mar-14 | 26-Mar-14 | -- | -- | | | I056 V042 | |
| 8009 | A009 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | Mary M. | George D. | 15-Mar-14 | 17-Mar-14 | 25-Mar-14 | -- | -- | | | I010 V009 | |
| 8010 | A010 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | Completed | Mary M. | George D. | 10-Mar-14 | | 25-Mar-14 | -- | -- | | | | |
| 8031 | A031 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | Mary M. | George D. | 10-Mar-14 | | 28-Mar-14 | -- | -- | | | | |
| 8021 | A021 | + New | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | Mary M. | George D. | 09-Mar-14 | | 23-Mar-14 | -- | -- | | | | |
| 8014 | A014 | 🚩 Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | Mary M. | George D. | 08-Mar-14 | | 15-Mar-14 | 21-Mar-14 25-Mar-14 | 24-Mar-14 | | | | |
| 8015 | A015 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | Mary M. | George D. | 07-Mar-14 | | 23-Mar-14 | -- | 14-Mar-14 | | | | |
| 8022 | A022 | 🚩 Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | In progress | Mary M. | George D. | 06-Mar-14 | 08-Mar-14 | 23-Mar-14 | -- | 14-Mar-14 | | | | |
| 9035 | V035 | ★ Value Added | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | | LOW | In progress | Mary M. | George D. | 04-Mar-14 | 08-Mar-14 | 14-Mar-14 | -- | 14-Mar-14 | | | A010 | |
| 9034 | I034 | ★ Issues | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | | HIGH | In progress | Mary M. | George D. | 04-Mar-14 | 08-Mar-14 | 14-Mar-14 | -- | 14-Mar-14 | | | A031 | |

Fig 0b Item Log “Sort by” dropdown

***Default sort should be by Risk Level [High > Med >Low]

ITEM LOG

04 Mar

Start date:
04 Mar 2014

End date:

Sort by:
Date opened

Site

Keyword

Risk status

Progress status

Assigned Resource

Owner [creator of item]

Date opened

Date closed

Date closed revised

Alert type [New, modified, Linked]

Risk level:
All

Alert status:
All

Assigned to:
Myself

Search

Add new item

| PID | ID[s] | Alert | Type | Site | Keyword | Description | Risk | Progress | Assigned by | Assigned to | Created | Modified | Due date | Revised Due | Closed | Notes | Audit | Links |
|------|-------|------------------|-------------|----------------------|--|---|------|------------------|-------------|-------------|-----------|-----------|-------------------------------------|-------------|-----------|-------|-------|--------------|
| 8001 | A001 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | Mary M. | George D. | 16-Mar-14 | 18-Mar-14 | 26-Mar-14 | -- | -- | | | I056 V042 |
| 8009 | A009 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | Mary M. | George D. | 15-Mar-14 | 17-Mar-14 | 25-Mar-14 | -- | -- | | | I010 V009 |
| | | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | Completed | Mary M. | George D. | 10-Mar-14 | | 25-Mar-14 | -- | -- | | | |
| | | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | Mary M. | George D. | 10-Mar-14 | | 28-Mar-14 | -- | -- | | | |
| | | + New | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | Mary M. | George D. | 09-Mar-14 | | 23-Mar-14 | -- | -- | | | |
| | | Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | Mary M. | George D. | 08-Mar-14 | | 15-Mar-14 21-Mar-14 25-Mar-14 | | 24-Mar-14 | | | |
| 8015 | A015 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | Mary M. | George D. | 07-Mar-14 | | 23-Mar-14 | -- | 14-Mar-14 | | | |
| 8022 | A022 | Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | In progress | Mary M. | George D. | 06-Mar-14 | 08-Mar-14 | 23-Mar-14 | -- | 14-Mar-14 | | | |
| 9035 | V035 | ★ Value Added | Value | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | In progress | Mary M. | George D. | 04-Mar-14 | 08-Mar-14 | 14-Mar-14 | -- | 14-Mar-14 | | | A010 |
| 9034 | I034 | ★ Issues | Issues | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | Mary M. | George D. | 04-Mar-14 | 08-Mar-14 | 14-Mar-14 | -- | 14-Mar-14 | | | A031 |

Fig.0c Click on ID number to edit an Item [edit item popup]

Start date:
04 Mar 2014

End date:

Sort by:
Date opened

Projects:
All

Item type:
All

Progress status:
All

Risk level:
All

Alert status:
All

Assigned to:
Myself

Search

Add new item

| PID | ID[s] | Alert | Type | Site | Keyword | Description | Risk | Progress | A |
|------|-------|------------------|-------------|----------------------|--|---|------|------------------|---|
| 8001 | A001 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | M |
| 8009 | A009 | ★ Link | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | M |
| 8010 | A01 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | Completed | M |
| 8031 | A031 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | M |
| 8021 | A021 | + New | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | Completed | M |
| 8014 | A014 | Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | M |
| 8015 | A015 | | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | Not yet opened * | M |
| 8022 | A022 | Mod | Action Item | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | MED | In progress | M |
| 9035 | V035 | ★ Value Added | Value | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | LOW | In progress | M |
| 9034 | I034 | ★ Issues | Issues | Serro-SF 01-03-14 | Keyword #1 Keyword #2 Keyword #3 | This is part of the description truncated | HIGH | In progress | M |

ACTION ITEM: #AO36

close

Created on 2 Mar 2014 by Mary Myles

Item type :
Action Item

Assigned by:
Mary Myles

Due date :

Assigned to:
Erin F

Original due date:
March 13 2014

Progress status:
Not yet started

Risk status:
High Risk

Site:
SFO-Sero 1

Keywords:

Comments:

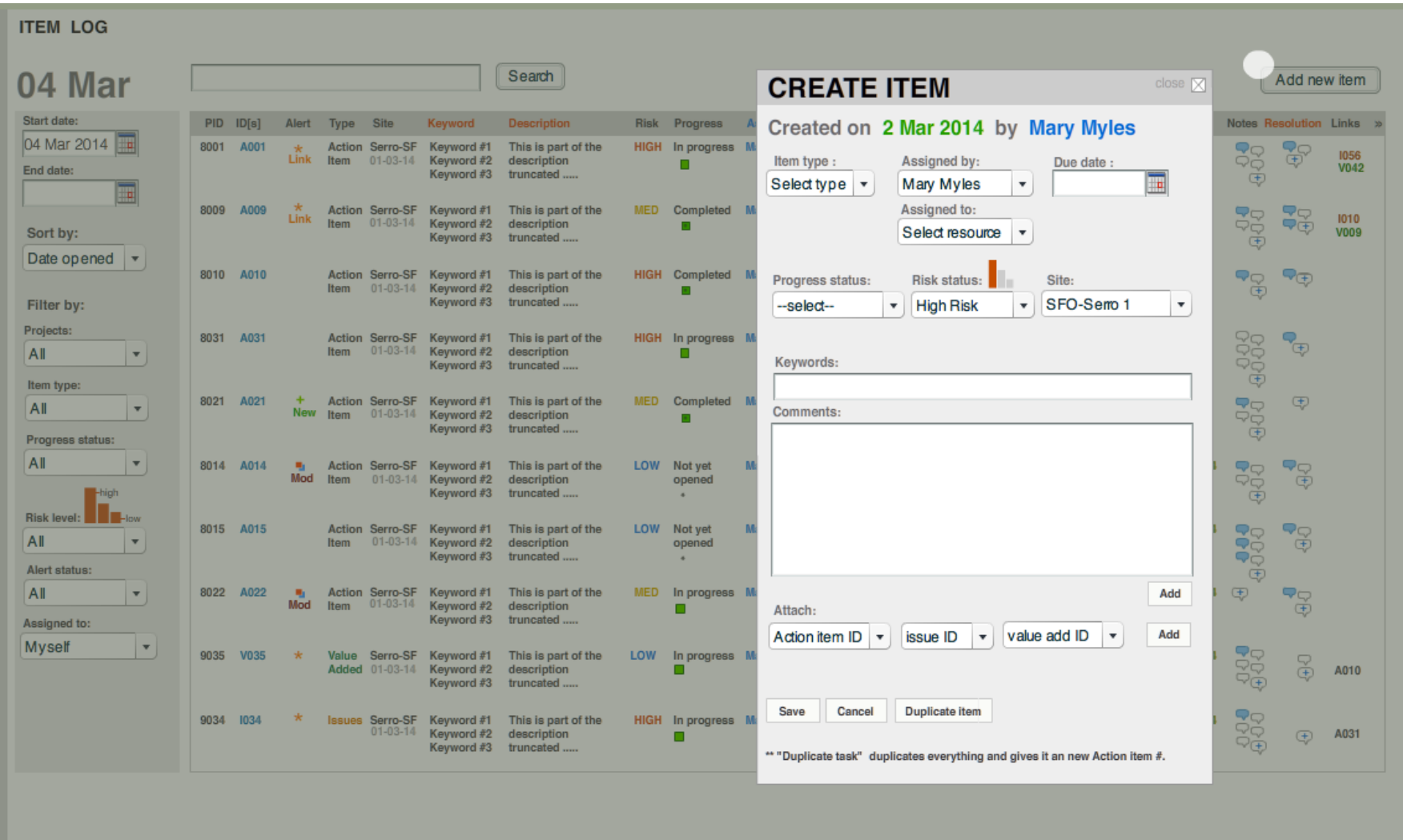
Attach:
Action item ID issue ID value add ID

Attached: VA# 1034 I#1001 AI# A2306, A2307

Save changes Cancel Duplicate item New item saved as AO38

** "Duplicate task" duplicates everything and gives it an new Action item #.

Fig. 0d To create a new item, click on the button on the right hand side of the Item log: Create new item popup



ITEM SCHEDULE PAGES by USER TYPE

There are three types of users:
Resource (this includes Engineers and Architects) (Fig. 1)
Manager (They assign items to the Resources) (Fig. 2) (Fig.3) (Fig.4)
Director (They monitor Managers) (Fig. 5)

| | | | | |
|-----------|----------|------------|----------|--|
| | On Login | On click | On click | |
| Resources | Fig 1 | Fig 5 or 6 | Fig 0 | |
| Manager | Fig 2, 3 | Fig 5 or 6 | Fig 0 | |
| Director | Fig 4 | Fig 5 or 6 | Fig 0 | |

Fig. 1 Resource View (weekly: sorted by project)

For **Resources** [engineers and architects], the items are sorted by **Project**. Each project has a **start date** (right below the project name). This view is the week by week/ **weekly view**. They can also see the **cumulative view**.

14 Mar

Retrieve snapshot:
14 Mar 2014

View:
Week by week

Projects:
All

Track item completion:
Project start

Risk level:
All

Progress status:
All

Item type:
Issues
Action item
Value added

Item status
Active:
Not yet started
In progress

Inactive:
On hold
Cancelled
Completed

Alerts:
Linked
New Item
Modified item

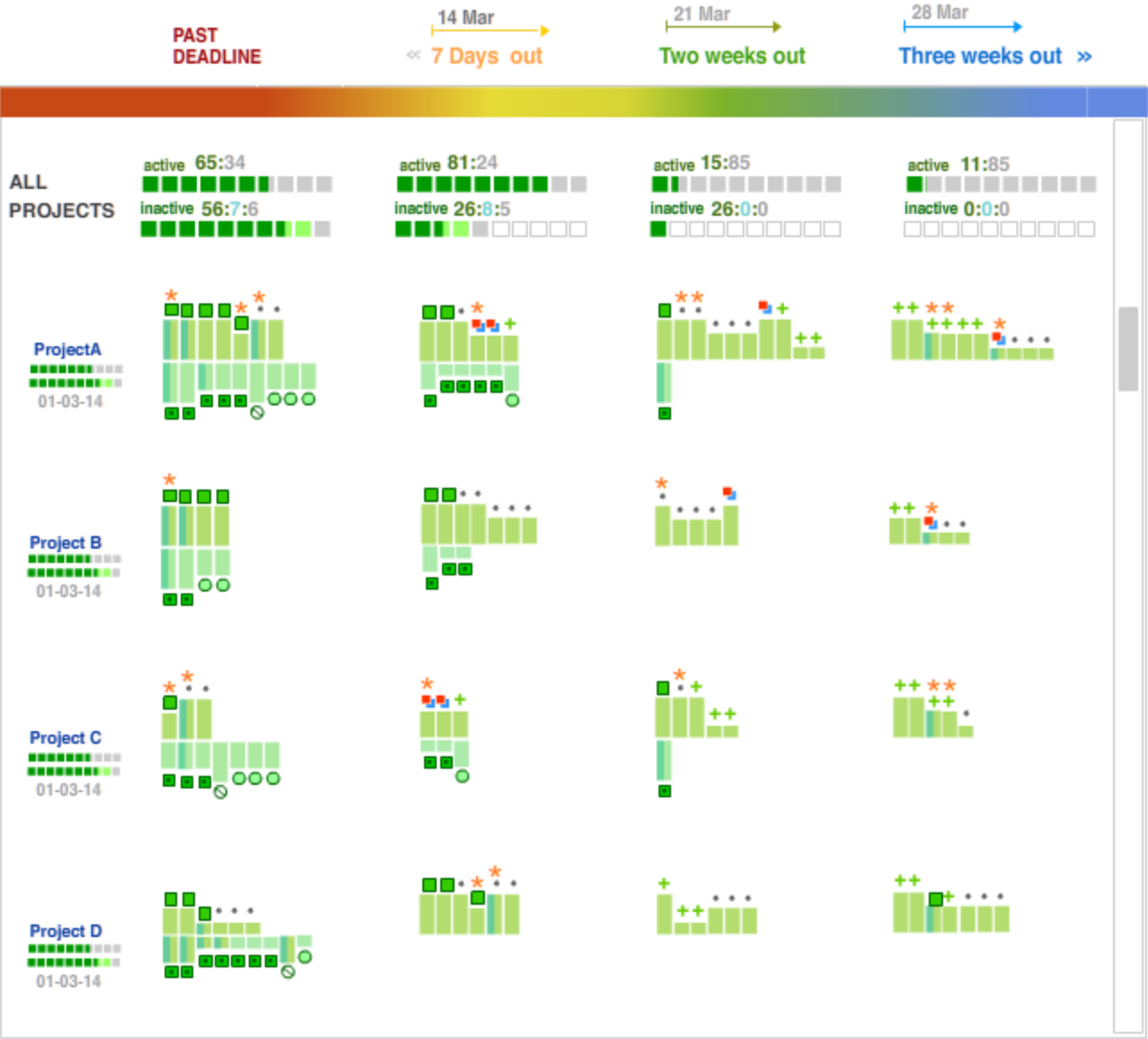


Fig. 2 Manager View (weekly: sorted by project)

For the managers, the items are sorted by **Project** or sorted by **Resource**. Choose using the dropdown in the rainbow header. Each project has a **start date** (right below the project name). This view is the **weekly** view.

**Clicking on the “+” icon next to the project title will show items sorted by resource.
Clicking on the **project title or a **resource name** will direct the user to the **item log** [Fig. 0a], prefiltred for that project or resource.

14 Mar

Start date:
14 Mar 2014

View:
Week by week

Projects:
All

Track item completion:
Project start

Risk level:
All

Progress status:
All

Item type:
Issues
Action item
Value added

Item status
Active:
Not yet started
In progress
Inactive:
On hold
Cancelled
Completed

Alerts:
Linked
New Item
Modified item

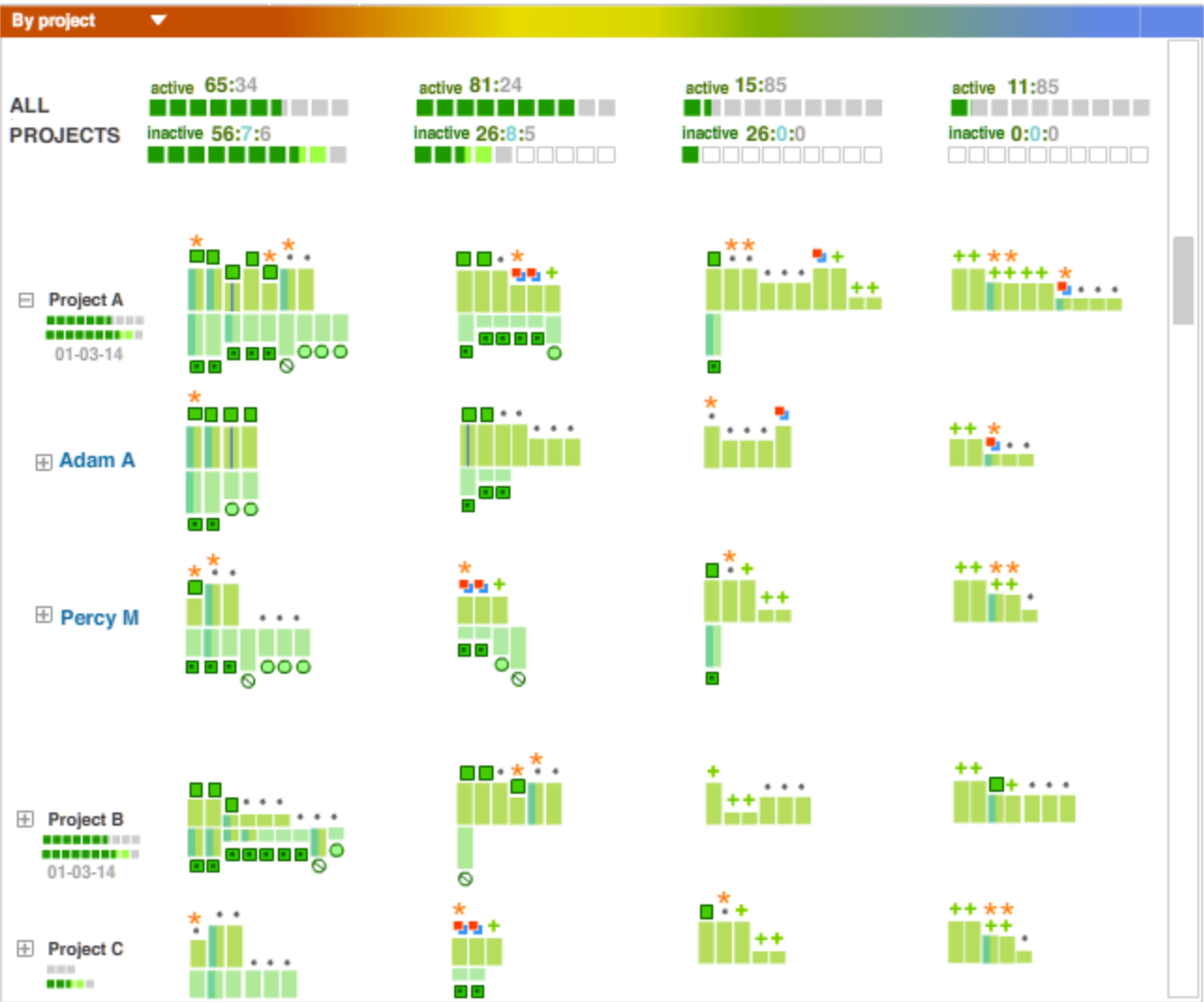


Fig. 3 Manager View (weekly: sorted by resource)

For managers, the items are sorted by **Project** or by **Resource**. Each project has a **start date** (right below the project name). This view is the **week by week view**.

WORK SCHEDULE

(Manager View A: By resource: weekly view)

14 Mar

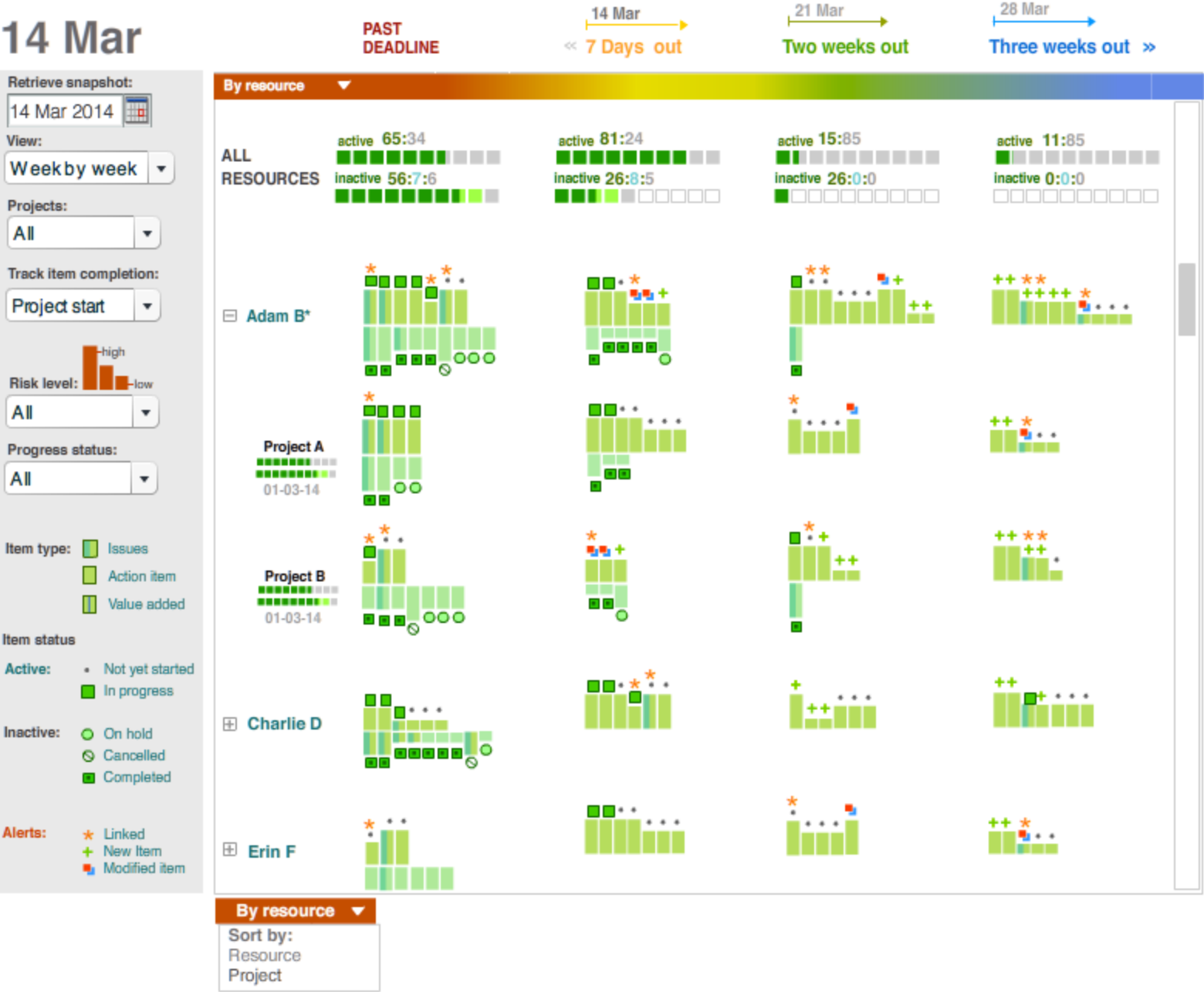


Fig.3A [New page: Alternative view of a hybrid summary/log page]

WORK SCHEDULE

(Resource View: By project: weekly view)

14 Mar

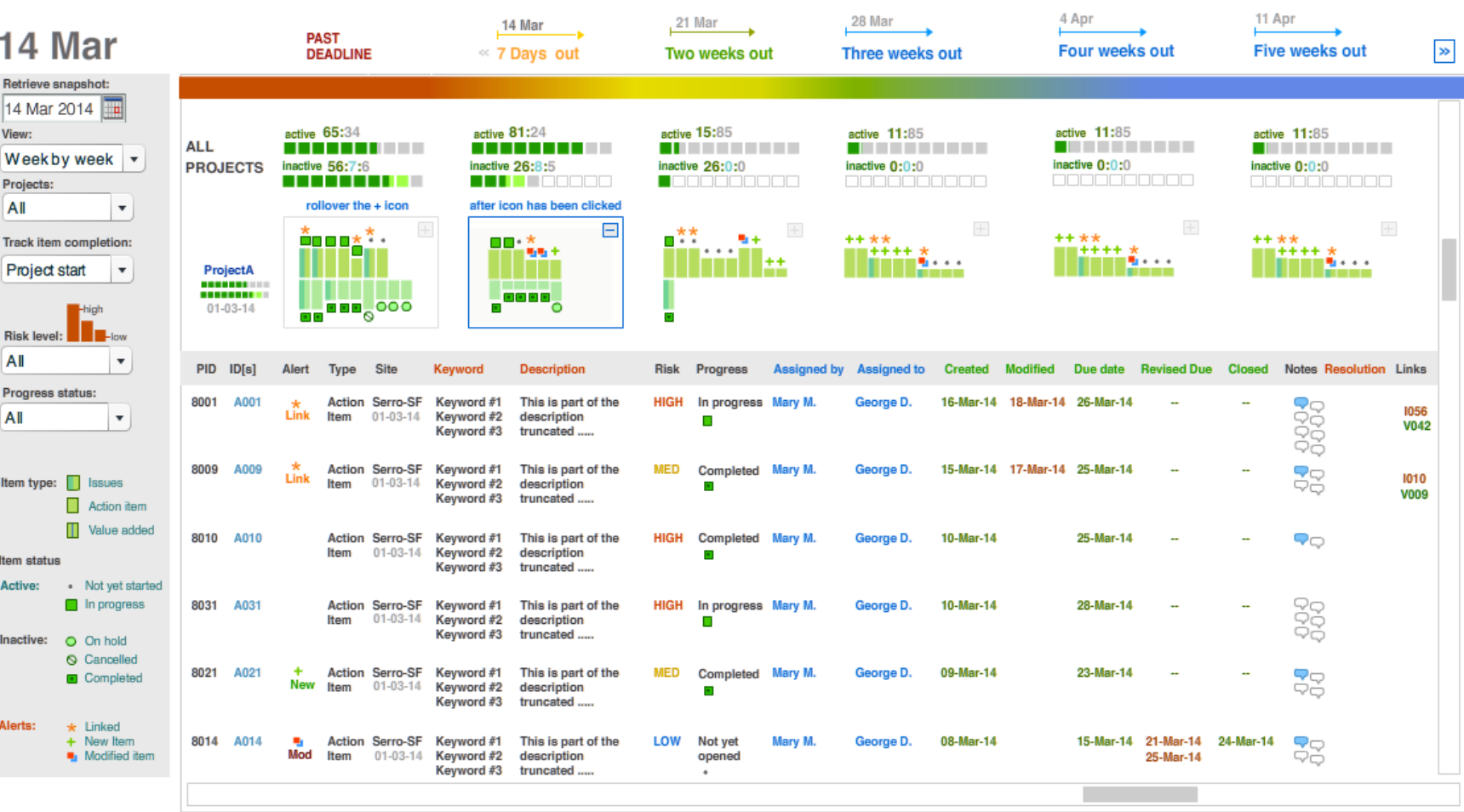


Fig. 4a Manager View (cumulative view: sorted by project)
Use the “view” dropdown to change the view from “week to week” to “Cumulative” This shows the total from start date onwards in week increments.
This view is the **cumulative view**: 7 days total, 14 days total, etc. etc.
Each project has a **start date** (right below the project name).
The start date of the project makes it easy to set the start date and see the progress of a project over the course of its lifespan.
[note changes in the colored header titles from ‘x weeks out’ > ‘ x weeks total’

1

Fig. 4B The **cumulative project view** can be accessed for any project as a popup.

Fig. 4A Cumulative Popup (Shows all items from **beginning of project to current moment**)

Each project has a ‘summary’ view icon which, when clicked, will show you all the items related to this project.

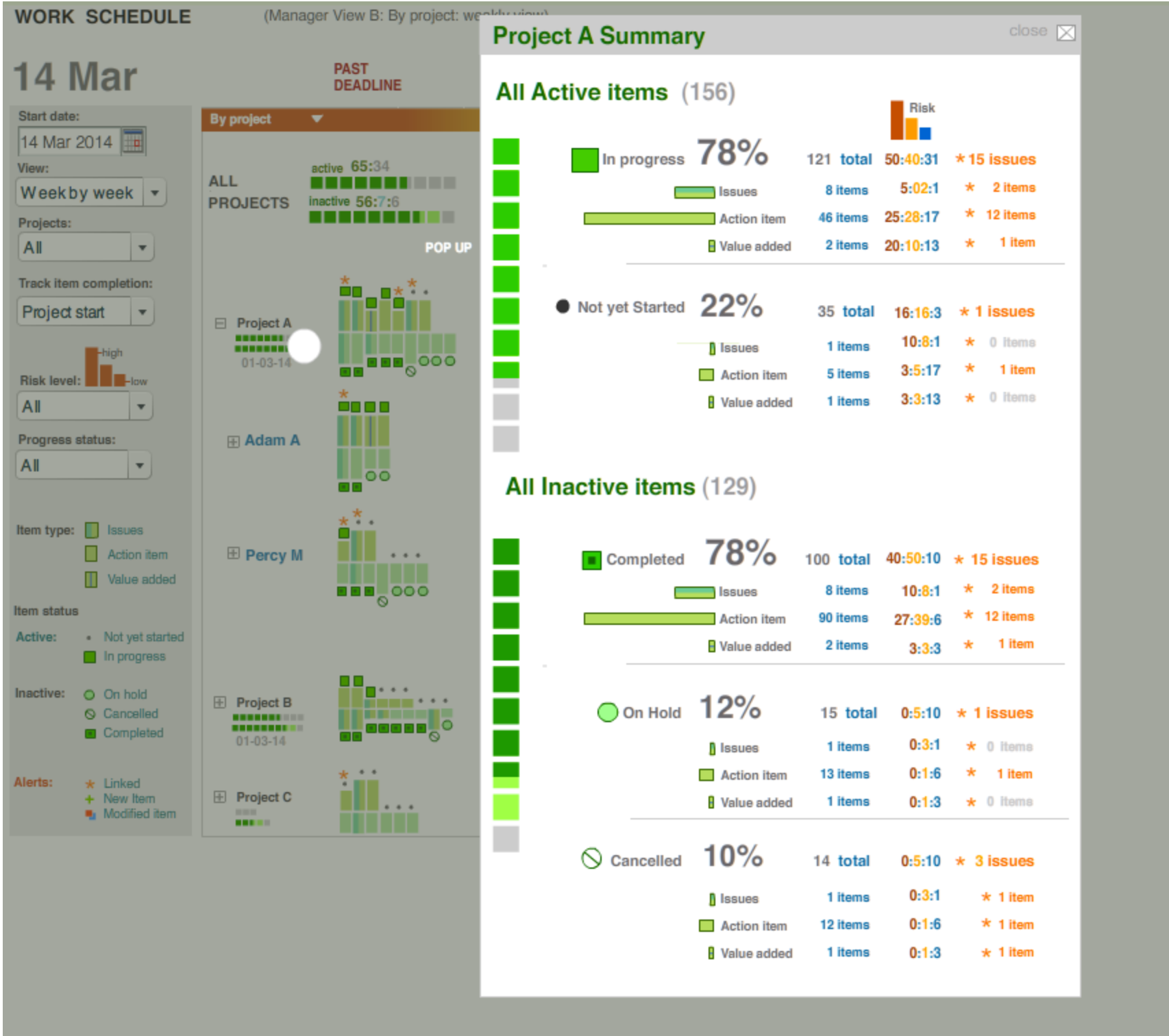
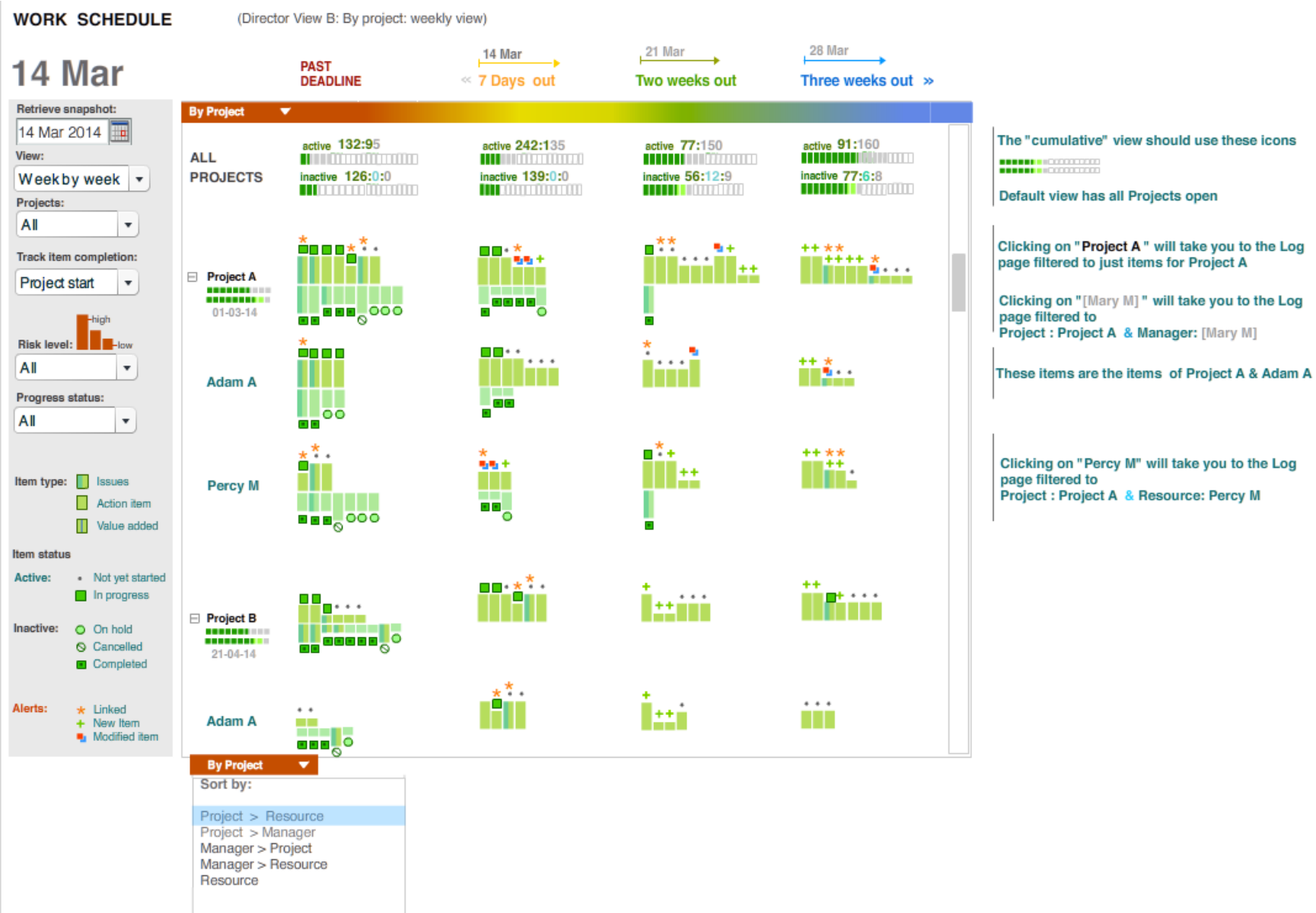
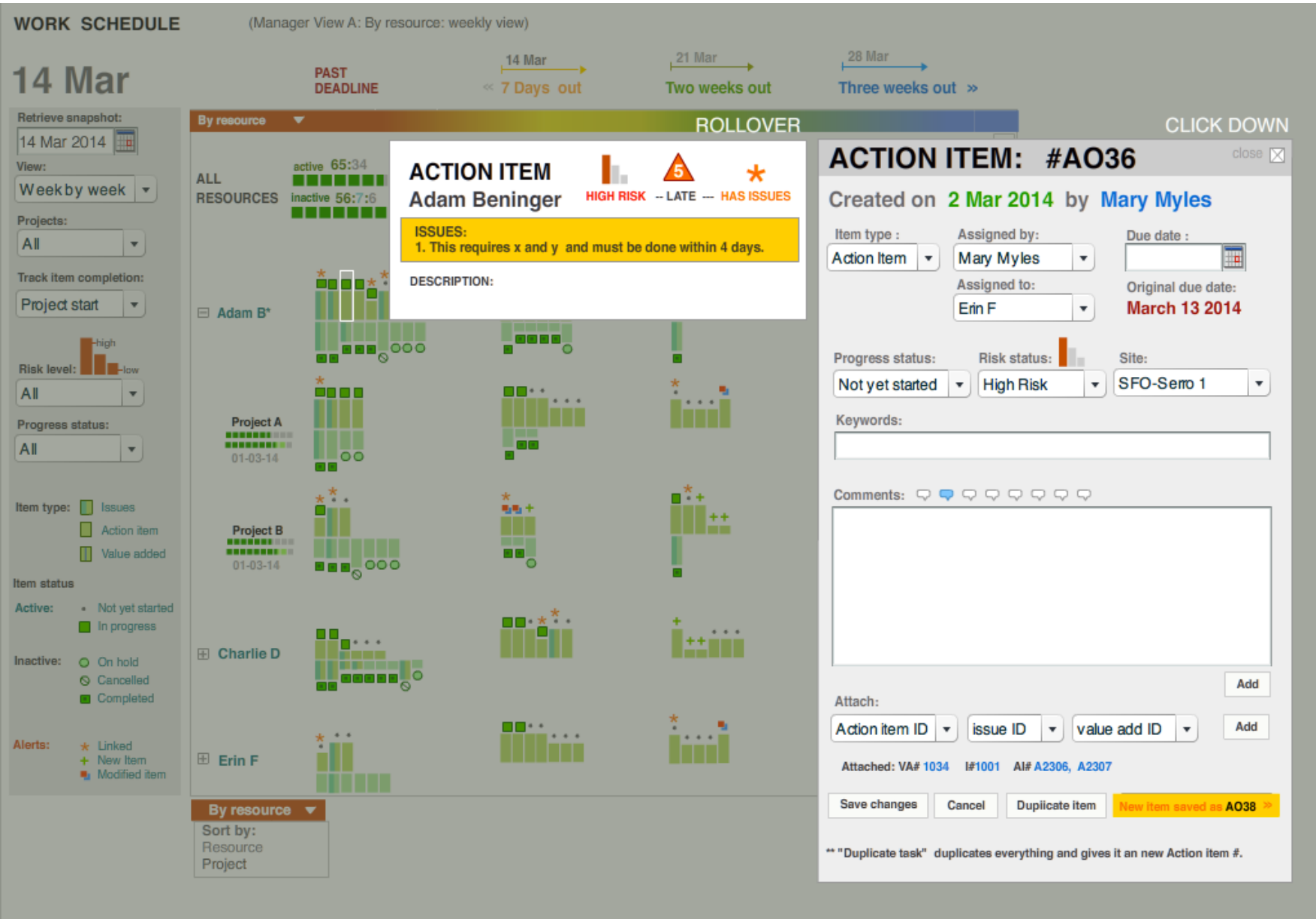


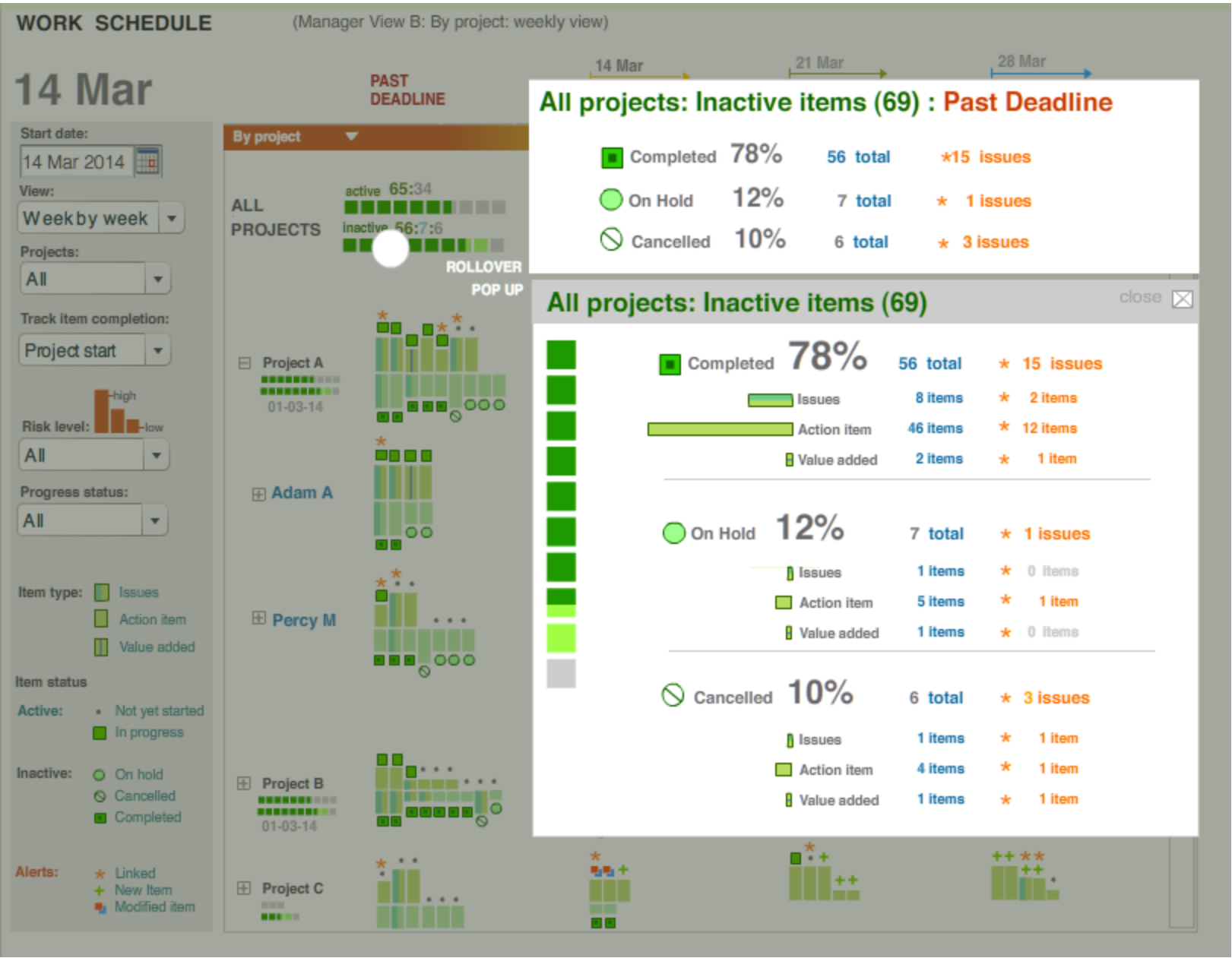
Fig. 5 Director's view (weekly: sorted by resource)





Shreryans: these are “view and edit” modes (NS)

Fig. 7 (All projects rollover and popup)



CONTACTS PAGE

Fig. 8 Contacts

Filter by:

Contact type:

All

Project:

All

















































Add a contact

This only is active when you've selected a project


TMMC_SERRO


Search

New project

| Company | Project | ID | Title | Name | Surname | Email | Cell phone | Fixed phone | Actions | Notes |
|------------------------------------|------------|-----|-----------------------|------------------------------|----------|--|--------------|--------------|---|-------|
| Serro | TMMC_SERRO | I1 | Sr Project Mgr | Richard [RL] | Lysinger | richard.lysinger@serro.com | 510 339-2354 | 415 661-9856 |    | |
| Serro | TMMC_SERRO | I2 | Finance | Raj [RS] | Serro | raj@serro.com | 415 114-5122 | 415 751-8223 |    | |
| Serro | TMMC_SERRO | I3 | Eng 1 | Douglas [DH] | Hanna | doug@serro.com | 510 339-2354 | 415 661-9856 |    | |
| Serro | TMMC_SERRO | I4 | Eng 2 | Chris [CG] | Gascon | chris@serro.com | 415 114-5122 | 415 751-8223 |    | |
| Serro | TMMC_SERRO | I5 | Eng 3 | Vihn [VT] | Tran | vihntran@serro.com | 510 339-2354 | 415 661-9856 |    | |
| Serro | TMMC_SERRO | I5 | Eng- Equip Support | Rey [RC] | Carlos | rey@serro.com | 415 114-5122 | 415 751-8223 |    | |
| TMMC [c] | TMMC_SERRO | C6 | Mgr Network & Telecom | Steve [SL] | Lantz | steve.lantz@tmmc.com | 310 114-5122 | 310 751-8223 |    | |
| TMMC [c] | TMMC_SERRO | C7 | Network Arch. | Mark [MF] | Fercano | marc.fercano@tmmc.com | 310 339-2354 | 310 661-9856 |    | |
| TMMC [c] | TMMC_SERRO | C8 | Network Engineer | Michael [MN] | Nguyen | marc.fercano@tmmc.com | 310 114-5122 | 310 751-8223 |    | |
| TMMC [c] | TMMC_SERRO | C9 | Network Engineer | Brian [BN] | Ngos | marc.fercano@tmmc.com | 310 339-2354 | 310 661-9856 |    | |
| TMMC [c] | TMMC_SERRO | C10 | Network Engineer | Carlos [CF] | Fabello | marc.fercano@tmmc.com | 310 114-5122 | 310 751-8223 |    | |
| Juniper [t] | TMMC_SERRO | C6 | Mgr Network & Telecom | Steve [SL] | Lantz | steve.lantz@juniper.com | 310 114-5122 | 310 751-8223 |    | |
| Juniper [t] | TMMC_SERRO | C7 | Network Arch. | Mark [MF] | Fercano | marc.fercano@juniper.com | 310 339-2354 | 310 661-9856 |    | |
| Arrow [t] | TMMC_SERRO | C8 | Network Engineer | Michael [MN] | Nguyen | marc.fercano@arrow.com | 310 114-5122 | 310 751-8223 |    | |
| Arrow [t] | TMMC_SERRO | C9 | Network Engineer | Brian [BN] | Ngos | marc.fercano@arrow.com | 310 339-2354 | 310 661-9856 |    | |
| Morrow Meadows [t] | TMMC_SERRO | C10 | Network Engineer | Carlos [CF] | Fabello | marc.fercano@mmorrow.com | 310 114-5122 | 310 751-8223 |    | |

Icon rollover text:

 duplicate contact with new ID

 attach to another project


 add a note

Fig. 9 New Contact Popup and New Project Popup

~~1) create project > fix so you can add multiple project #~~

2) create contact > add ability to add your contact to multiple projects.

Client view does not have “Project” select dropdown. “New Project” button also disappears.

CONTACTS

TMMC_SERRO

Search

New project

Filter by:

Contact type:

All

Project:

All

Add contact

This only is active when you've selected a project

| Company | Project | ID | Title | Name | Surname | Email | Cell phone | Fixed phone | Actions | Notes |
|--------------------|------------|----|----------------|--------------|----------|----------------------------|--------------|--------------|---------|-------|
| Serro | TMMC_SERRO | I1 | Sr Project Mgr | Richard [RL] | Lysinger | richard.lysinger@serro.com | 510 339-2354 | 415 661-9856 | | |
| Serro | TMMC_SERRO | I2 | Finance | Raj [RS] | Serro | raj@serro.com | 415 114-5122 | 415 751-8223 | | |
| Serro | TMMC_SERRO | I3 | Eng 1 | Douglas [DH] | Hanna | doug@serro.com | 510 339-2354 | 415 661-9856 | | |
| Serro | TMMC_SERRO | | | Chris [CH] | Don | chris@serro.com | | | | |
| Serro | TMMC_SERRO | | | Vihnantra | | vihnantra@serro.com | | | | |
| Serro | TMMC_SERRO | | | Rey | | rey@serro.com | | | | |
| TMMC [c] | TMMC [c] | | | Steve | Jarvis | steve.jarvis@serro.com | | | | |
| TMMC [c] | TMMC [c] | | | Marc | Ferrero | marc.ferrero@serro.com | | | | |
| TMMC [c] | TMMC [c] | | | Marc | Ferrero | marc.ferrero@serro.com | | | | |
| TMMC [c] | TMMC [c] | | | Marc | Ferrero | marc.ferrero@serro.com | | | | |
| TMMC [c] | TMMC [c] | | | Marc | Ferrero | marc.ferrero@serro.com | | | | |
| Juniper [t] | TMMC [t] | | | Steve | Jarvis | steve.jarvis@serro.com | | | | |
| Juniper [t] | TMMC [t] | | | Marc | Ferrero | marc.ferrero@serro.com | 510 339-2354 | 310 661-9856 | | |
| Arrow [t] | TMMC [t] | | | Marc | Ferrero | marc.ferrero@serro.com | 5122 | 310 751-8223 | | |
| Arrow [t] | TMMC [t] | | | Marc | Ferrero | marc.ferrero@serro.com | 310 339-2354 | 310 661-9856 | | |
| Morrow Meadows [t] | TMMC [t] | | | Marc | Ferrero | marc.ferrero@serro.com | | | | |

CREATE CONTACT

close

ID C1002 created on 2 Mar 2014 by Mary Myles

Name:

Surname:

Cell phone:

Fixed phone:

Email:

Contact type:

Select type

Project:

SFO-Serro 1

Add

SFO-Serro 2

x

Company:

Notes:

Save

Cancel

CREATE PROJECT

close

Project name:

Project number:

Add

1302-138

1302-211

Start date:

Save

Cancel

In Edit Project , 'Start date' becomes 'Revision date'

Once you save a project, it appears in the 'project' dropdown. Selecting the project will allow you to 'add a contact' to that project.

Save confirmation message

C1002 Jem Jonas has been saved to Contacts

Once a contact is saved, all fields clear out except for contact type, project and company. This makes creating a list of clients contacts easier.

Project

Inventory Management

Project(s)

Contacts

Figure 1
OR
Figure 2
OR
Figure 3

Item log

Project

Invenotry Management

Inventory
Items

Receviend
items

Receibed
asset
scan

staged
asset
scan