



Notes:

- Exact tab placement and other layout are naturally subject to change as we progress through beta feedback. Please remain resourceful when looking for visual items that may have shifted slightly since these screenshots were taken.
- If in doubt about a button or icon's functionality, try hovering the mouse over the item to see if there's a popup tip (aka "tooltip") which offers some clarification.
- The test scripts at the end refer to the following screen shots...

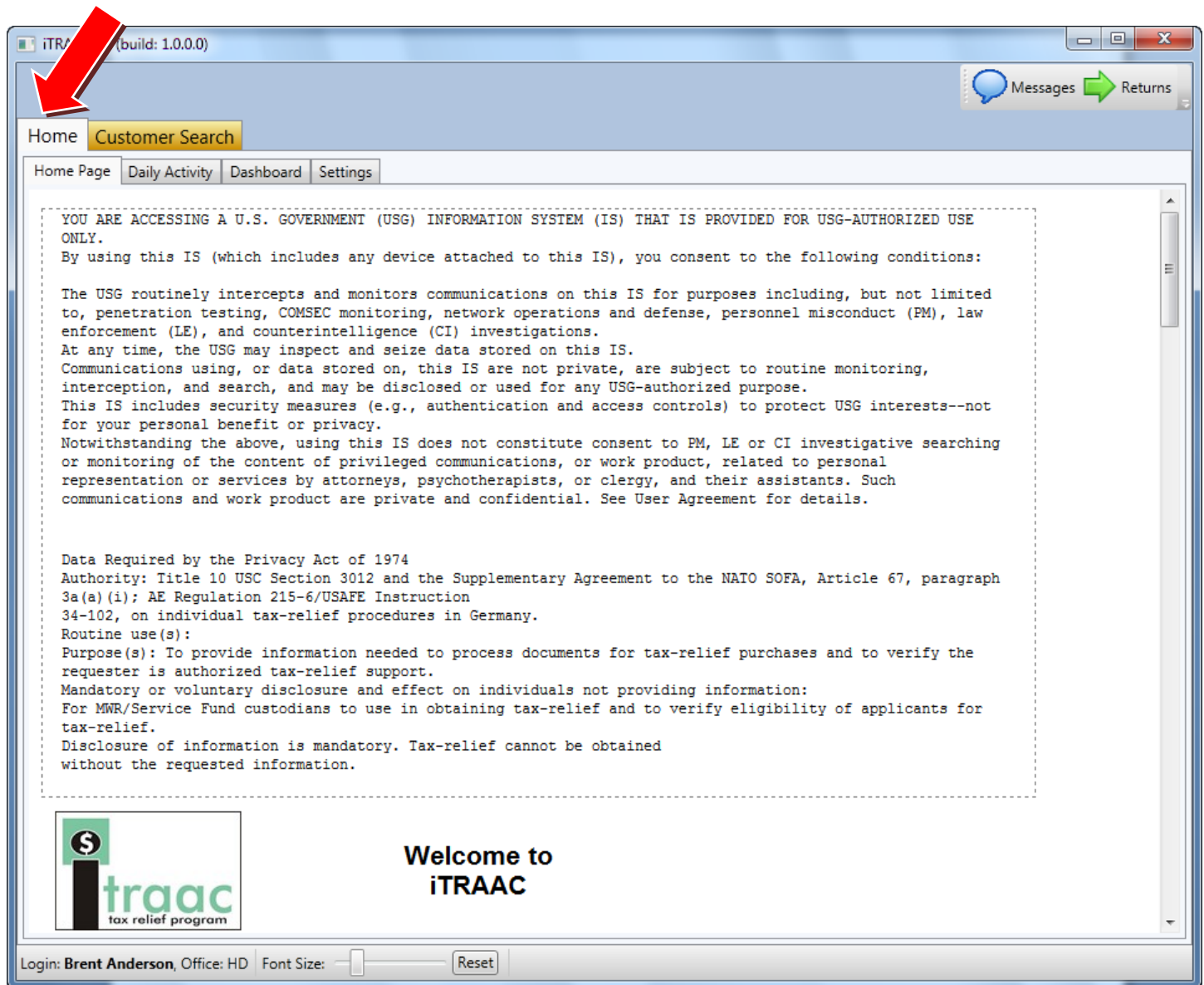
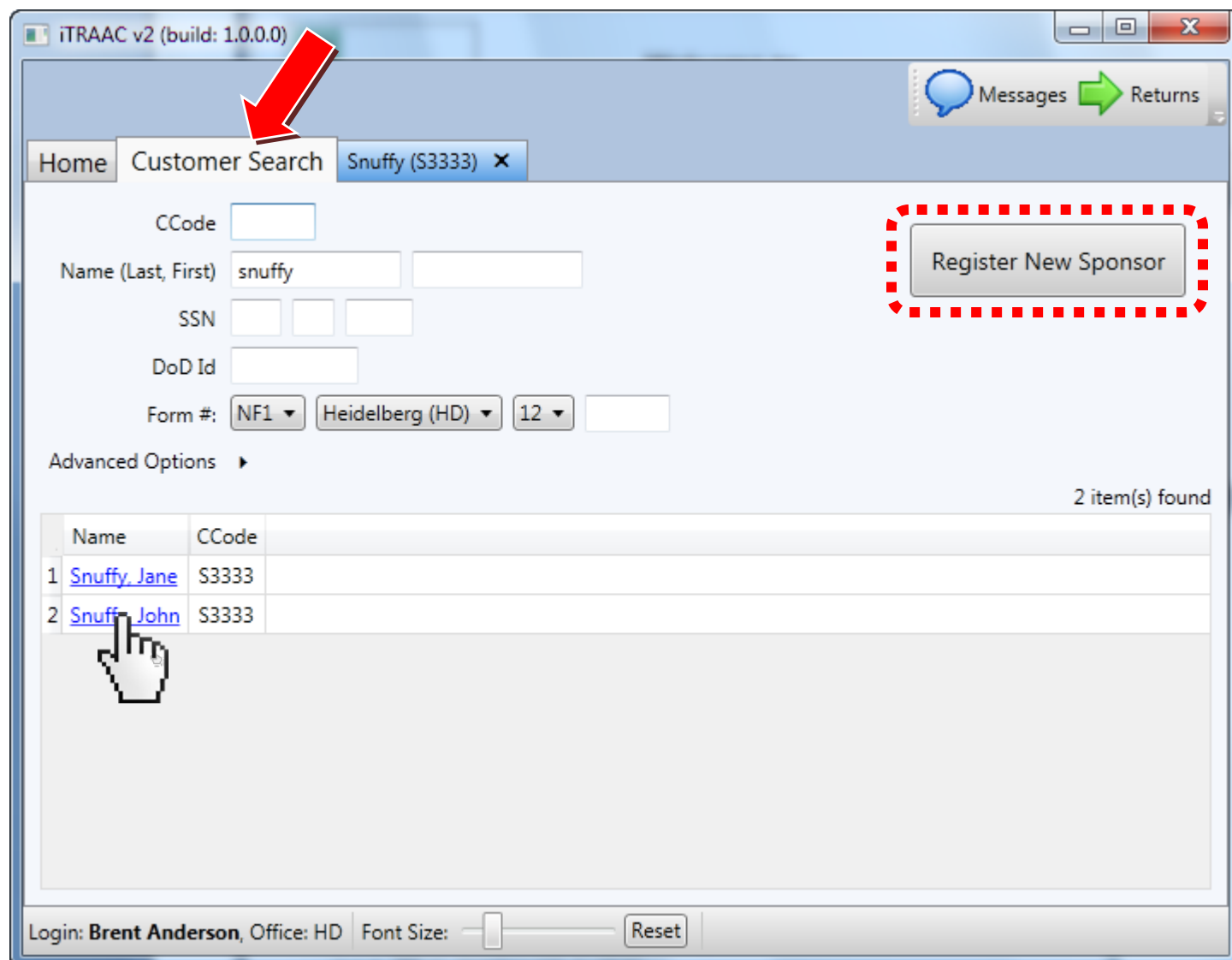


Figure 1 - Home Page



iTRAAC v2 (build: 1.0.0.0)

Messages Returns

Home Customer Search Snuffy (S3333) X

CCode

Name (Last, First) snuffy

SSN

DoD Id

Form #: NF1 Heidelberg (HD) 12

Advanced Options ▶

2 item(s) found

	Name	CCode
1	Snuffy, Jane	S3333
2	Snuffy, John	S3333

Login: Brent Anderson, Office: HD Font Size: Reset

Figure 2 - Customer Search

iTRAAC v2 (build: 1.0.0.0)

Home Customer Search Snuffy (\$3333) x

Save Save & Close

Members Add Member (Marriage) ☒ Show deactive members

(De)Active	SSN	DoDId	First Name	MI	LName	Suffix	Email	CCode
<input checked="" type="checkbox"/> Sponsor	111 - 22 - 3333		John	T	Snuffy		sgt_snuffy@email.com	S3333
<input type="checkbox"/> Spouse	444 - 55 - 6666		Jane	L	Snuffy		mrs_snuffy@email.com	S3333

Household Info

Duty Phone: DSN: 370 - 1780
Duty Location: Grafenwöhr
Rank: SFC
Official Mail Address: Line1: Not required, AG info, etc.
CMR 419 BOX 1600
APO AE 09102

Tax Forms UTAP ☐ Enrolled

NF1 NF2 ☐ Show All ☐ Not Printed ☒ Unreturned: 5 ☐ Returned Not Filed: 0 5 form(s)

Form #	Sponsor	AuthDep	Purchased	Package #	Location	Status
1 NF1-HD-11-32225	John	Jane	9/21/2011 4:56:52 PM	HD_11264-0002	Customer	Not Printed
2 NF1-HD-11-32226	John	Jane	9/21/2011 4:56:52 PM	HD_11264-0002	Customer	Not Printed
3 NF1-HD-11-32227	John	Jane	9/21/2011 4:52:34 PM	HD_11264-0001	Customer	Unreturned
4 NF1-HD-11-32223	John	Jane	9/21/2011 4:52:34 PM	HD_11264-0001	Customer	Unreturned
5 NF1-HD-11-32224	John	Jane	9/21/2011 4:52:34 PM	HD_11264-0001	Customer	Unreturned

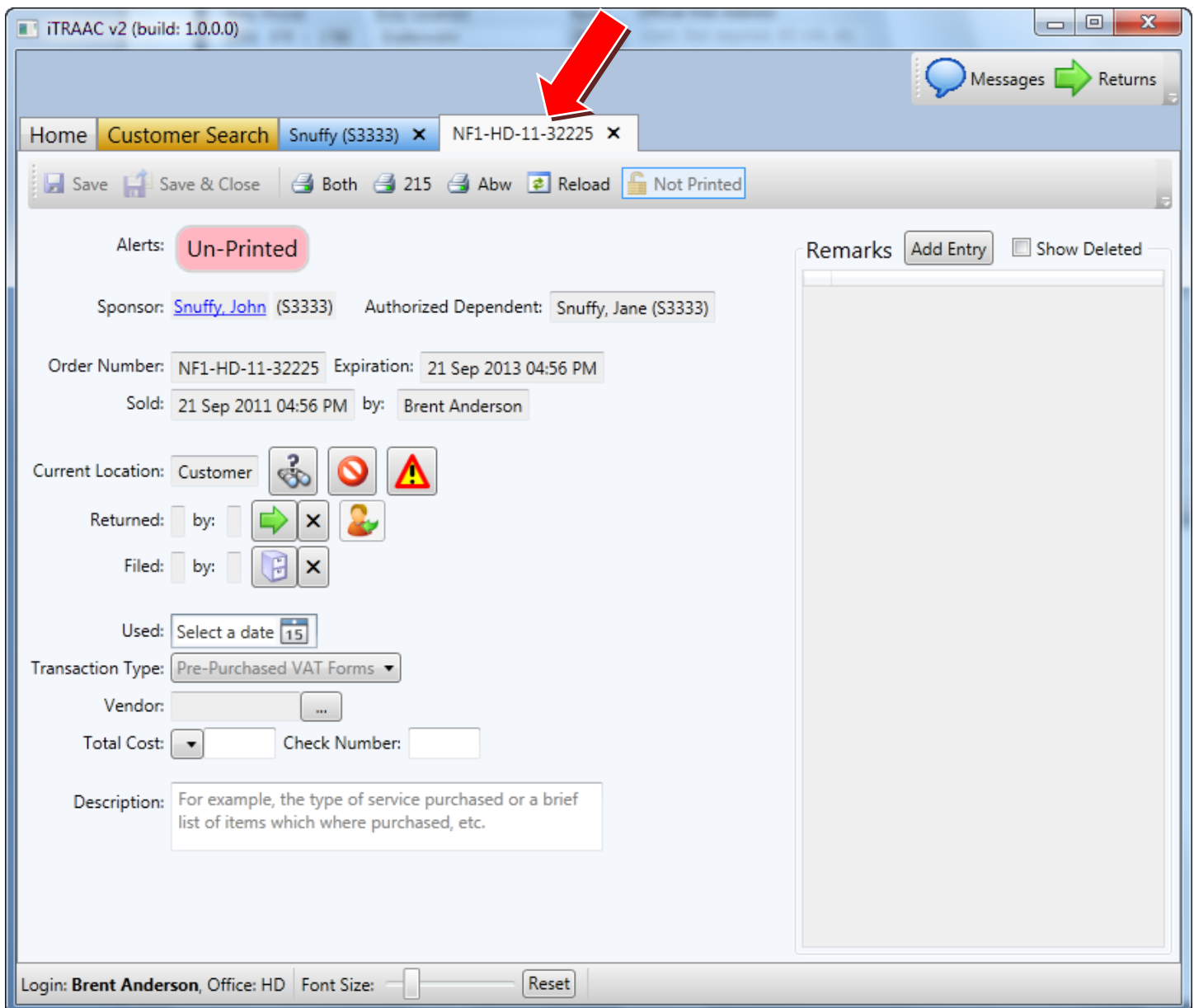
Alerts Suspend PCS

Diary Add Entry ☐ Show Deleted

	LastUpdate	Title	Remarks
1	12/9/2011	PCS'ed	Household Deactivated
2	9/13/2011		Spouse set to Jane Snuffy

Login: Brent Anderson, Office: HD Font Size: Reset

Figure 3 - Customer Screen (aka Household)



iTRAAC v2 (build: 1.0.0.0)

Messages Returns

Home Customer Search Snuffy (S3333) NF1-HD-11-32225

Save Save & Close Both 215 Abw Reload Not Printed

Alerts: **Un-Printed**

Sponsor: [Snuffy, John](#) (S3333) Authorized Dependent: [Snuffy, Jane](#) (S3333)

Order Number: NF1-HD-11-32225 Expiration: 21 Sep 2013 04:56 PM

Sold: 21 Sep 2011 04:56 PM by: Brent Anderson

Current Location: Customer ? ? ?

Returned: by: ? ? ?

Filed: by: ? ? ?

Used: Select a date 15

Transaction Type: Pre-Purchased VAT Forms

Vendor: ...

Total Cost: Check Number:

Description: For example, the type of service purchased or a brief list of items which where purchased, etc.

Remarks Add Entry Show Deleted

Login: Brent Anderson, Office: HD Font Size: Reset

Figure 4 - Order Form Screen

iTRAAC v2 (build: 1.0.0.0)

Home Customer Search Snuffy (S3333) NF1-HD-11-32225

Save Save & Close Both 215 Abw Reload

Alerts: **Un-Printed**

Sponsor: [Snuffy, John](#) (S3333) Authorized Depe

Order Number: NF1-HD-11-32225 Expiration: 21 Sep 2

Sold: 21 Sep 2011 04:56 PM by: Brent Ander

Current Location: Customer

Returned: by: [icon] [icon] [icon]

Filed: by: [icon] [icon]

Used: Select a date 15

Transaction Type: Pre-Purchased VAT Forms

Vendor: [icon]

Total Cost: [icon] Check Number: [icon]

Description: For example, the type of service purchase list of items which where purchased, etc.

Remarks Add Entry

Return/File Forms

Sequence #: 23007 Search

Hide Filed

7 item(s) found

Form #	Status	Name
NF1-RA-11-23007	Returned	RAFFERTY (R0000),
NF1-SP-09-23007	Returned	EPPS (E3686), ANG
NF1-WI-09-23007	Returned	Hall (H1727), Alexis
NF1-RA-08-23007	Returned	EBERLE (E2726), BC
NF1-HD-11-23007	Unreturned	ANDERSON (A0999)
NF1-RA-07-23007	Returned	WILLARD (W1343),
NF1-ST-11-23007	Unreturned	MALLORY (M2663)

Login: Brent Anderson, Office: HD Font Size: [icon] Reset

Figure 5 - Returns Popout Window

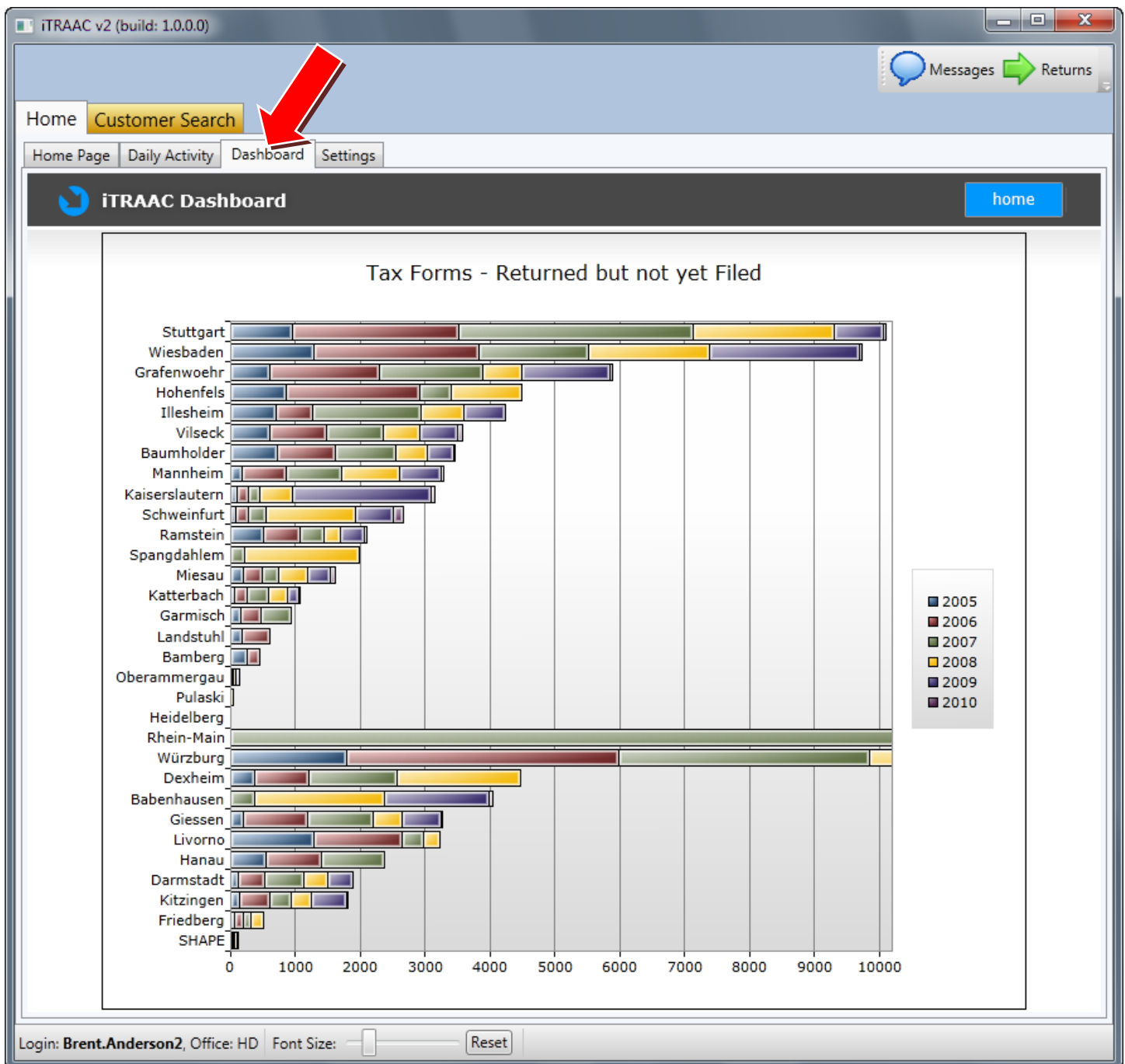


Figure 6 – “Dashboard” / Reporting Area (e.g. Forms Returned but not yet Filed)

iTRAAC v2 (build: 1.0.0.0)

Admin Tools Messages Returns

Home Customer Search

Home Page Daily Activity Dashboard Settings

Matrix Printer Assignments

NFx:
Abw:

Signature Block

☒ Office Wide: FMD Managers
☐ Per User

Heidelberg (HD) Office Info

POC: Add Agent

Office Phone:
Hours:

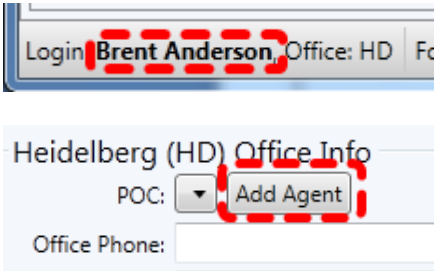
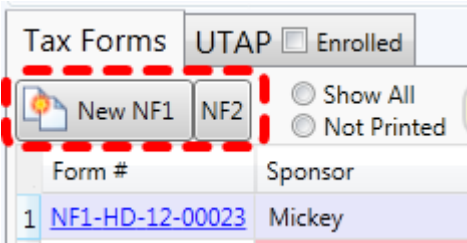
Address Line 1: USAG Baden-Wuerttemberg (VAT Office)
Line 2: Attn: OMDC Unit 29237
Line 3: APO AE 09014, USA Tel: 06221-338-9586
Line 4:

VAT Offices (select row to see Agents)

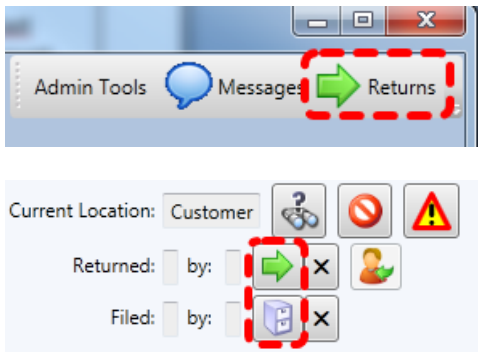
	Office	Phone	OfficeHours	AgencyLine
1	Bamberg (BA)			USAG Bam
2	Baumholder (BR)			USAG Baur
3	Customer			
4	Garmisch (GA)			USAG Garr
5	Geilenkirchen (GE)			470 ABS/S'
6	Grafenwoehr (GR)			USAG Graf
7	Heidelberg (HD)			USAG Bade
8	Hohenfels (HO)			USAG Hoh
9	Illesheim (IL)			USAG Anst
10	Kaiserslautern (KL)			USAG Kais
11	Katterbach (KA)			USAG Anst
12	Landstuhl (LU)			USAG Kais
13	Lost			
14	Mannheim (MA)			USAG Bade
15	Miesau (MI)			USAG Kais
16	Pulaski (PU)			USAG Kais
17	Ramstein (RA)			86 SVS/SV
18	...			USAG ...

Login: Brent.Anderson2, Office: HD (Admin) 04:40 Font Size: Reset

Figure 7 - Settings Page

Task	v2 Approach
Simple tasks	
<p>(1) Add New VAT Agent (Admin only)</p>  <p>The screenshot shows the 'Heidelberg (HD) Office Info' section. The 'Add Agent' button is highlighted with a red dashed box. The status bar at the bottom-left shows 'Login: Brent Anderson, Office: HD'.</p>	<p>Enter admin mode by double clicking your login name in the status bar at bottom-left of screen (fig.1). Navigate to Home tab > Settings tab, hit [Add Agent] button under Office Info (fig.7).</p> <p>TODOs:</p> <ul style="list-style-type: none"> • The new user's login name must coincide with an active Windows account or iTRAAC won't allow access... in ideal world, this list of users would be maintained in the new EURMWR Domain, for now we'll have to manage them on each VAT workstation... this does have the implication of making it more annoying for people to jump between multiple workstations... i.e. the generic POSUser account cannot be used anymore, I believe this is a good thing from a security standpoint • Probably need to display default login name formed by first+last name, but also allow for matching to an existing Windows account. • Slickest way would be to prompt "Create Windows Account?", prompt for local admin credentials, and automatically create (or verify already exists)... otherwise admin just has a little more manual work to do, not the end of world. • This also has conversion implications for existing users... probably ideally we'd have a script (powershell??) that takes the active iTRAAC v1 users and creates local Windows accounts for them... I guess the existing naming convention is good enough • Just in case this new user ever needs to fall back to v1, these logins can be readily activated in via v1's [reset password] button.
<p>(2) Sell New Forms</p>  <p>The screenshot shows the 'Tax Forms' section. The 'New NF1' button is highlighted with a red dashed box. Below it, a table lists forms with columns 'Form #' and 'Sponsor'. The first row shows '1' and 'NF1-HD-12-00023' under 'Form #', and 'Mickey' under 'Sponsor'.</p>	<p>Search for & open customer (fig.2) See NF1/NF2 buttons in lower left (fig.3)</p>

(3) Return/File Form



Open Returns window (fig.5)
enter form#
select form to open from list


-OR-

Search & open customer
select form to open from lower left grid (fig.3)

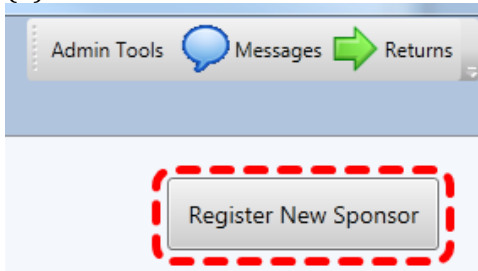
then hit the Return (green right arrow) or File (filing cabinet) buttons (fig.4)

(4) Lost Form



(fig.5) Click . Form location will change to LOST. The lost forms memo will pop up, prepopulated with the basics.

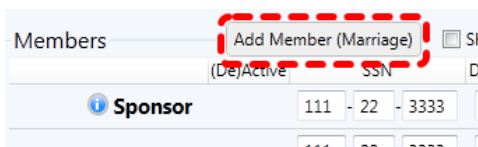
(5) Create New Account



Customer search screen (fig.2) => [Register New Sponsor] button.

Duplicate Check - As the new customer name and SSN/DoDId are entered, a background search will check if the customer already exists. If existing potential customer matches are found, they will be displayed in a grid to the right of the members list. Click on the customer name in this grid to open an existing customer record instead, and then simply close the empty new sponsor tab without saving.

(6) Add New Dependent



Open customer
Hit [Add Member (Marriage)] button at the top of Members grid (fig.2).

Hidden Actions - Take a moment to discover the hidden house member action buttons (fig.3). Examples include: designating a Spouse and initiating Divorce procedures. Typically we don't plan on hiding functionality but it was determined that these buttons were making the screen too busy from a typical usage standpoint.

More complex tasks

(7) Consolidating customer codes

The screenshot shows a form with fields for Email, CCode, and GLOBAL. The CCode field contains 'M3333' and has a red box around the [*] button next to it.

(fig.3) The little [*] button next to the CCode column header will change all house member codes to be the same as the sponsor.

Over time the codes can get a little messy for example due to mis-keyed SSN's and changing last names. We've often heard from the field that confusion can arise regarding which code should be provided when a customer comes into the tax office for service. This button makes it easy to say, "ok, now everyone in your family should use the same code." Naturally, in order to prevent confusion, this should not be applied without informing the customer of the change.

(8) Marriage

The screenshot shows the 'Members' grid with a red dashed box around the 'Add Member (Marriage)' button. Below the grid, the 'Sponsor' row is visible with SSN 111 - 22 - 3333.

(fig.3) Hit [Add Member (Marriage)] button at the top of Members grid. Continue to follow on screen prompting.

(9) Divorce

The screenshot shows the 'Members' grid with a red dashed box around the 'Divorce' button. Below the grid, the 'Sponsor' and 'Spouse' rows are visible with SSN 111 - 22 - 3333.

(fig.3) (Hidden) [Divorce] button to the left of Spouse.

(10) Name Change

The screenshot shows the 'Members' grid with a red dashed box around the 'Name Change' button. Below the grid, the 'Mickey' and 'Minnie' rows are visible with LName 'Mouse'.

(fig.3) Simply edit the name(s) in the members grid and save.

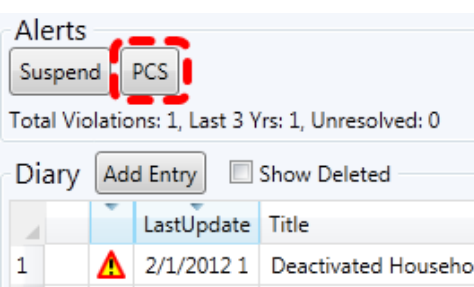
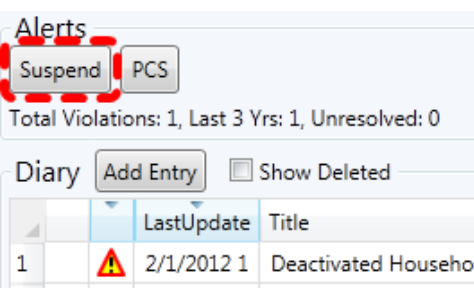
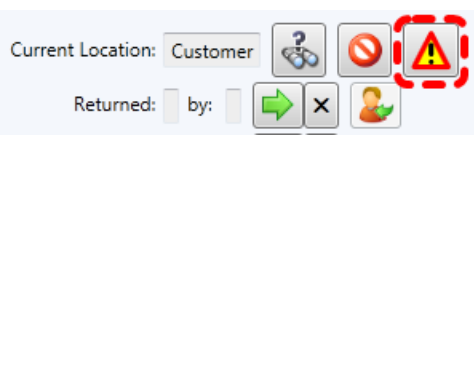

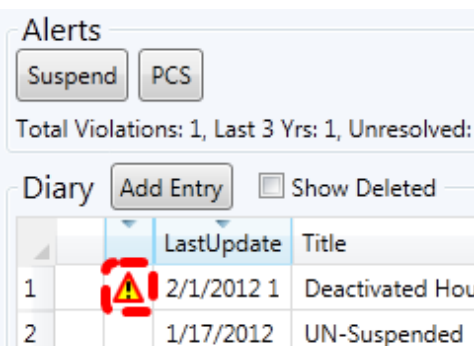
Background logic will determine if the name has changed significantly (e.g. due to Marriage) or if it is simply a typo fix. If it is a true name change, system will then stamp all existing forms to date with the *old* name to maintain proper paper trail. New forms will be generated with the new name.

(11) Active/Deactive

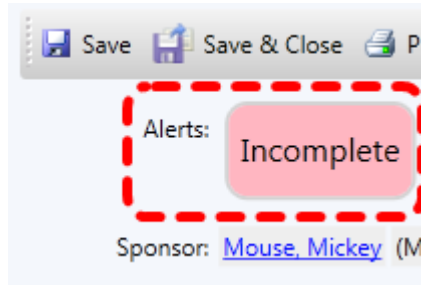
The screenshot shows the 'Members' grid with a red dashed box around the 'DeActive' button. Below the grid, the 'Sponsor' and 'Spouse' rows are visible with SSN 111 - 22 - 3333.


(fig.3) [DeActivate] button is found under the De-Active column of the members grid.

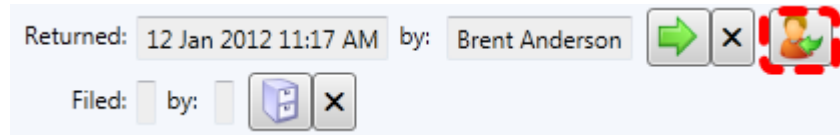
The Sponsor's de-active flag is now synonymous with the entire household to make things more consistent. When the household is deactive, no new forms can be sold. Attempting to deactivate Spouse will prompt for proper divorce documentation and must be executed via the [Divorce] button. Deactivating a dependent is basically just a means to hide them from cluttering the list of members... it will also remove them from being listed on the Authorized Dependent choice when generating a new forms package.

<p>(12) PCS'ing</p> 	<p>(fig.3 – [PCS] button is in lower right of screen under Alerts) PCS is now an explicit status that can be set. It will automatically deactivate the whole household.</p>
<p>(13) Suspension/Barring</p> 	<p>(fig.3 – [Suspend] button next to PCS) There is now only the single concept of Suspension to keep things simple. Barring is represented by a suspension with no end date. While suspended, the whole household will be deactivated.</p>
<p>(14) Form Violation</p> 	<p>(fig.4) Click . Enter violation reason.</p> <ul style="list-style-type: none">Also, attempting to file an NF1>2500 Euro will trigger an automatic violation event.Violation history will be listed in the Form remarks list as well as the Customer remarks list, lower left corner of fig.3Form Violations also now automatically generate a Customer Suspension event...<ul style="list-style-type: none">This automatic customer suspension is left with an open end date to prompt Agents to address the circumstances and establish an appropriate suspension end date.The 3 strikes in 1yr count is also automatically maintained.
<p>(15) Resolving Alerts</p> 	<p>(fig.3) UN-Checking Alerts will now prompt for a reason. This reason will be recorded in the AlertResolved field. This is a compromise to make alerts more manageable, yet still provide some trackability.</p>

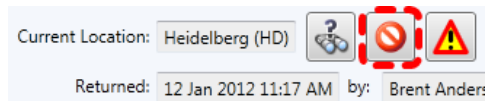
(16) Incomplete Form




- (fig.4) Attempting to File a form that doesn't pass validation will now automatically set the form to incomplete status.
- **NOTE: Incomplete forms now count against the customer's 10 count.**
- Incomplete forms will be highlighted in the list of forms on the corresponding customer tab as well to remind the Agent to give the incomplete forms back to the customer for correction when the customer next returns to the office...
 - When this moment occurs, the Agent should use the  button to indicate the change in form location from office to customer.



(17) Void Form



-  icon fig.4
- TODO: should prompt for encouraging agent to collect all copies of this form where possible.