RyteGate Operations Manager
System Design

V1.0

CONTENT

OVERVIEW

The Business Operations Manager application is designed to help capture, manage and report on data related to day to day business operations. The system includes a range of functions, accounting, car pool, vendor management, etc.

The system is designed for use in-house by RyteGate Technologies. The user interface (UI) displayed in this document is not a true representation of the final product UI.

This blueprint outlines the process and application design decisions to be implemented as part of RyteGate's Business Operations Manager Software project. RyteGate Canada conducted requirements validation sessions along with mock up reviews, which produced various meeting minutes and associated documentation. Ultimately, these sessions allowed the collective team to define various processes which pertain to the different process flows which have been translated and converted to system rules in this document.

1 SCREEN FLOW SYSTEM SETUP

Top Level Navigation.

The top navigation bar will look as shown in the image below and comprise of the following:
This section will focus on the System Setup Screen.

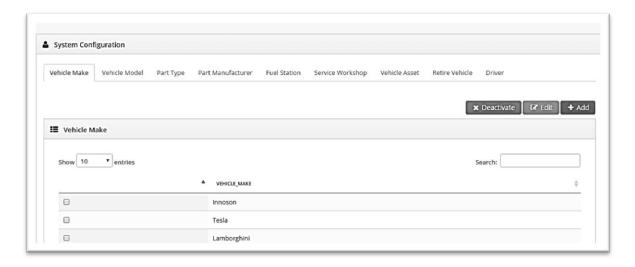| Dashboard	User Administration	Asset Manager	Carpool Manager	Finance Administration	Vendor Administration	Reports	**System Setup**

1.1 SYSTEM SETUP SCREEN

- The system setup screen will comprise of multi-layered tabs with the following headers outlined in the table below.
- The layout of each tab will follow the flow shown in the sample image below.
- **Exception** - *The User Role Tab is the only exception to the screen flow defined here because it has 3 action buttons instead of 2.*

  - Insert 'edit', and 'add' action button at the top of each tab page.
  - On tab homescreen, display list of all existing *db* items on page.
  - Put row item *onfocus* for action buttons by selecting check box.
  - Alternatively, each row could have a separate 'add', 'edit' and 'deactivate' button If this is the case, remove the check box mentioned in point 2 above.

- **Button Function**
  Add – on click, open a new page with blank form – Write data to *db tbl onsubmit*
  Edit – open new form page – echo() existing values from *db tbl* for user to edit.

User Role	User Department	User Position	User Login	Company Location	Asset Make	Asset Model	Asset Category
Vendor	Asset Status	Asset File Type	Vendor Category	Country	Imprest category	Expense Category	

1.1.1 USER ROLE TAB

Unlike other tabs under the system Setup screen, the user role tab will have 3 action buttons. (Add, Edit, Permissions)

i. Action - Create New Role
    Action Trigger – 'add' button
    o onsubmit
        ▪ Success – Return to tab home page with msg 'role created successfully'
        ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Role Name	Free Form	-	User Entry	Role,RoleName
3	Make Active	list (dropdown)	Yes/No	0,1	Role,Active

ii. Action – Edit Existing Role
     Action Trigger (edit button)
     o onsubmit
         ▪ Success – Return to tab home page with msg 'role updated successfully'
         ▪ Fail – Remain on form page with fail reason.

iii. Action – Assign Permissions to existing User Role.
      Action Trigger – 'Permission' Button
      o Onclick
          ▪ Open Page with a list of pages/modules that the role should have access to. See sample screen below.
          ▪ Each page/function will be represented by an ID in the *permissions db tbl*.

1.1.2 USER POSITION TAB
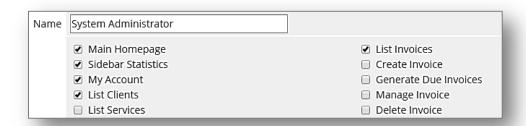
  i. Action - Create New Position
    Action Trigger – 'add' button
      o onsubmit
        ▪ Success – Return to tab home page with msg 'Created successfully'
        ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Position Name	Free Form	-	User Entry	UserPosition,PositionName
2	Description	Free Form	-	User Entry	UserPosition,PositionDesc

  ii. Action – Edit Existing Role
    Action Trigger (edit button)
      o onsubmit
        ▪ Success – Return to tab home page with msg 'Updated successfully'
        ▪ Fail – Remain on form page with fail reason.

1.1.3 USER DEPARTMENT TAB

  i. Action - Create New Department
    Action Trigger – 'add' button
      o onsubmit
        ▪ Success – Return to tab home page with msg 'Created successfully'
        ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Department Name	Free Form	-	User Entry	Department,DeptName
2	Make Active	list (dropdown)	Yes/No	0,1	Department,Active
3	-	system	-	timestamp	Department,Created

  ii. Action – Edit Existing Role
    Action Trigger (edit button)
      o onsubmit
        ▪ Success – Return to tab home page with msg 'Updated successfully'
        ▪ Fail – Remain on form page with fail reason.

1.1.4 COMPANY LOCATION

i. Action - Create New Location
    Action Trigger – 'add' button
    - o onsubmit
        - Success – Return to tab home page with msg 'Created Successfully'.
        - Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Location Name	Free Form	-	User Entry	CompanyLocation,LocationName
2	Address	Free Form	-	User Entry	CompanyLocation,Address
2a	Address2	Free Form	-	User Entry	CompanyLocation,Address2
3	State	Free Form	-	User Entry	CompanyLocation,State
4	Country	list (dropdown)	CompanyLocation,CountryName	CountryId	CompanyLocation,CountryId
5	Make Active	list (dropdown)	Yes/No	0,1	CompanyLocation,Active
6	-	system	-	timestamp	CompanyLocation,Created

ii. Action – Edit Existing Role
     Action Trigger (edit button)
     - o onsubmit
         - Success – Return to tab home page with msg 'Updated Successfully'
         - Fail – Remain on form page with fail reason.

1.1.5 ASSET MANUFACTURER

i. Action - Create New Manufacturer
    Action Trigger – 'add' button
    - o onsubmit
        - Success – Return to tab home page with msg 'Created Successfully'.
        - Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Manufacturer	Free Form	-	User Entry	Assetmanufacturer,manufacturername
2	Make Active	list (dropdown)	Yes/No	0,1	Assetmanufacturer,Active
3	-	system	-	timestamp	Assetmanufacturer,Created
4	-	system	-	userid	Assetmanufacturer,Createdby

ii. Action – Edit Existing Role
     Action Trigger (edit button)
     - o onsubmit
         - Success – Return to tab home page with msg 'Updated successfully'
         - Fail – Remain on form page with fail reason.

1.1.6 ASSET CATEGORY TAB

    i.   Action - Create New Asset Type
        Action Trigger – 'add' button
            o   onsubmit
                    ▪   Success – Return to tab home page with msg 'Created successfully'
                    ▪   Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Select Manufacturer	list (dropdown)	assetmanufacturer,manufacturername	manufacturerid	Assetcategory,manufacturerid
2	Asset Category	freeform	-	User Entry	Assetcategory,assetname
3	Make Active	list (dropdown)	Yes/No	0,1	Assetcategory,Active
4	-	system	-	timestamp	Assetcategory,Created
5	-	system	-	userid	Assetcategory,Createdby

    ii.   Action – Edit Existing Role
        Action Trigger (edit button)
            o   onsubmit
                    ▪   Success – Return to tab home page with msg 'Updated successfully'
                    ▪   Fail – Remain on form page with fail reason.

1.1.7 ASSET MODEL TAB

    i.   Action - Create New Asset Model
        Action Trigger – 'add' button
            o   onsubmit
                    ▪   Success – Return to tab home page with msg 'Created successfully'
                    ▪   Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Select Manufacturer	list (dropdown)	assetmanufacturer,manufacturername	manufacturerid	assetmodel,manufacturerid
2	Select Category	list (dropdown)	assetcategory,assetname	assetcatid	AssetModel,assetcatid
3	Model	Free Form	-	User Entry	AssetModel,modelname
3	Make Active	list (dropdown)	Yes/No	0,1	AssetModel,Active
4	-	system	-	timestamp	AssetModel,Created
5	-	system	-	userid	AssetModel,Createdby

    ii.   Action – Edit Existing Role
        Action Trigger (edit button)
            o   onsubmit
                    ▪   Success – Return to tab home page with msg 'Updated successfully'.
                    ▪   Fail – Remain on form page with fail reason.

1.1.8 ASSET FILE TYPE TAB

i. Action - Create New Asset Status
    Action Trigger – 'add' button
    - o   onsubmit
        - ▪ Success – Return to tab home page with msg 'Created successfully'
        - ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Asset File Type	Free Form	-	User Entry	assetfiletype,filetype
2	Make Active	list (dropdown)	Yes/No	0,1	assetmodel,active
3	-	system	-	timestamp	assetmodel,created
4	-	system	-	userid	assetmodel,createdby

ii. Action – Edit Existing Role
    Action Trigger (edit button)
    - o   onsubmit
        - ▪ Success – Return to tab home page with msg 'Updated successfully'
        - ▪ Fail – Remain on form page with fail reason.

1.1.9 VENDOR CATEGORY TAB

iii. Action - Create New Vendor
    Action Trigger – 'add' button
    - o   onsubmit
        - ▪ Success – Return to tab home page with msg 'Created successfully'
        - ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Vendor Category	Free Form	-	User Entry	vendorcategory,categorydesc

iv. Action – Edit Existing Role
    Action Trigger (edit button)
    - o   onsubmit
        - ▪ Success – Return to tab home page with msg 'Updated successfully'
        - ▪ Fail – Remain on form page with fail reason.

1.1.10 IMPREST CATEGORY TAB

v. Action - Create New Imprest Category
Action Trigger – 'add' button
- o onsubmit
  - Success – Return to tab home page with msg 'Created successfully'
  - Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Imprest Category	Free Form	-	User Entry	imprestcategory,categoryname
2	Category Description	Free Form	-	User Entry	imprestcategory,categorydesc

vi. Action – Edit Existing Role
Action Trigger (edit button)
- o onsubmit
  - Success – Return to tab home page with msg 'Updated successfully'
  - Fail – Remain on form page with fail reason.

1.1.11 EXPENSE CATEGORY TAB

vii. Action - Create New Expense Category
Action Trigger – 'add' button
- o onsubmit
  - Success – Return to tab home page with msg 'Created successfully'
  - Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Expense Category	Free Form	-	User Entry	expensecategory,categoryname
2	Category Description	Free Form	-	User Entry	expensecategory,categorydesc

viii. Action – Edit Existing Role
Action Trigger (edit button)
- o onsubmit
  - Success – Return to tab home page with msg 'Updated successfully'
  - Fail – Remain on form page with fail reason.

1.1.12 SERVICE VENDOR

i. Action - Create New Vendor Profile
   Action Trigger – 'add' button
   - o onsubmit
     - ▪ Success – Return to tab home page with msg 'Created Successfully'.
     - ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	Vendor Name	Free Form	-	User Entry	vendor,vendorname
2	Vendor Category	list (dropdown)	vendorcategory,categorydesc	vendorcategoryid	vendor,vendorcategoryid
3	Specialty	Free Form	-	User Entry	vendor,vendorspecialty
4	Email	Free Form	-	User Entry	vendor,email
5	Telephone	Free Form	-	User Entry	vendor,phoneno
6	Address	Free Form	-	User Entry	vendor,vendoraddress1
6a	Address 2	Free Form	-	User Entry	vendor,vendoraddress2
7	City	Free Form	-	User Entry	vendor,vendorcity
8	State	Free Form	-	User Entry	vendor,vendorstate
9	Country	list (dropdown)	country,coutryname	countryid	vendor,countryid
10	Make Active	list (dropdown)	Yes/No	0,1	vendor,Active
11	-	system	-	timestamp	vendor,Created
12	-	system	-	userid	vendor,Createdby

ii. Action – Edit Existing Role
   Action Trigger (edit button)
   - o onsubmit
     - ▪ Success – Return to tab home page with msg 'Updated Successfully'
     - ▪ Fail – Remain on form page with fail reason.

2 SCREEN FLOW – USER ADMINISTRATION

Top Level Navigation
This section will focus on the Users Screen.

Dashboard	**User Administration**	Asset Management	Car Pool Management	Finance Administration	Vendor Administration	Reports	System Setup

The user administration will have 3 sub menus namely:
(1) Create User (2) Create User Login (3) View/Edit User Profile

2.1 USERS LANDING PAGE SCREEN FLOW

- On click, open up to a screen with a paginated list of existing system users in the *user db tbl* displayed in tabular format.

- The table will display the attributes outlined in the table below from the database tables listed in the second row of the table below each attribute.

- Insert an 'Add User' action button at the top of the page.
- Each User row will have a 'view/edit' action button on the far right of the row.

User Id	First Name	Last Name	Department	Position	Active
User db tbl	*User db tbl*	*User db tbl*	*User db tbl*	*User db tbl*	*User db tbl*

Button Function

- **Create User** – Opens a new form
- **View/Edit Button –** Open a new form page – echo () existing values from *user db tbl* (excluding 'password' field) for user to edit.

i.   Action – Create New User
Action Trigger – 'Create User' button
- o onsubmit
- ▪ Success – Return to User home page with msg. 'User' added successfully'.
- ▪ Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	First Name	Free Form	-	User Entry	User,firstname
2	Last Name	Free Form	-	User Entry	User,lastname
3	Email Address	Free Form	-	User Entry	User,email
5	Telephone	Free Form	-	User Entry	User,phone
6	User Department	list (dropdown)	Department,Deptname	deptid	User,deptid
7	User Position	list (dropdown)	UserPosition,Positionname	positioned	User,positionid
8	User Role	list (dropdown)	Role,Rolename	roleid	User,roleid
10	Active	list (dropdown)	Yes,No	1,0	User,active

ii. Action – Edit User
Action Trigger – 'Edit' button
- o onsubmit
- ▪ Success – Return to User home page with msg. 'submitted successfully'.
- ▪ Fail – Remain on form page with fail reason.

3   SCREEN FLOW – USER LOGIN

Top Level Navigation
This section will focus on the Users Screen.

Dashboard	**User Administration**	Asset Management	Car Pool Management	Finance Administration	Vendor Administration	Reports	System Setup

3.1   USER LOGIN PAGE SCREEN FLOW

- On click, open up to a screen with a paginated list of all users from the *userlogin db tbl* that have been assigned login credentials displayed in tabular format.

- The table will display the attributes outlined in the table below from the database tables listed in the second row of the table below each attribute.

- Insert a 'Create New Login' action button at the top of the page.
- Each User row will have an 'Edit' action button on the far right of the row.

First Name	Last Name	Department	Username (Email)	Active
User db tbl	*User db tbl*	*User db tbl*	*User db tbl*	*User db tbl*

Button Function

- **Create New Login** – Opens a new form with a list of all users that do not have login credentials.
- **Edit Button –** open new form page – echo () the following attributes for the user in focus from *the userlogin db tbl* –
  - email address (cannot be edited)
  - password field – blank (password can be changed)

iii.   Action – Create New Login
       Action Trigger – 'Add User' button
       - onsubmit
         - Success – Return to User home page with msg. 'User' added successfully'.
         - Fail – Remain on form page with fail reason.

S/No	Field Label	Field Type	Disp. Data Src (tbl,col)	Submit Value	Data Dest (tbl,col)
1	User Name	list (dropdown)	User, firstname, lastname (CONC)	userid	Userlogin,userid
2	Password	Free Form	-	User Entry	Userlogin,password
3	Confirm Password	Free Form	-	User Entry	
4	-	system	User, Email Address	email	userlogin,email
5	Active	list (dropdown)	Yes,No	1,0	User,active

iv.   Action – Edit User
      Action Trigger – 'Edit' button
      - onsubmit
        - Success – Return to User home page with msg. 'submitted successfully'.
        - Fail – Remain on form page with fail reason.