Crew Board Feedback – C. Fraser – February 6, 2019

**Unit and Worker Boards**

1. **Unit board** needs to be in order by unit number. Preferably starting with pumpers, then bulk tractors, then trailers, then pickups.

TODO: Filter by selected Service Points, Unit Type(pumpers, then bulk tractors, then trailers, then pickups.), then unit number. ——#521

1. Currently there are too many items on the **unit board**, we should be able to reduce the number of units showing up in each list by:
   1. Pairing tractors with trailers on this unit list

Can we only pair up the tractor and trailer when they are added in one crew, otherwise we have to maintain a pair up list

* 1. Being able to activate/deactivate units so non active units do not show up on list, or show up at the bottom of the list (color coded red for example)

TODO: Filter out deactivated units ——#521

* 1. Filter list by unit type

Do you mean, add a unit type filter or checkboxes on top of Unit Board ?

1. **Worker board** – should be filtered again to remove office staff, bulk plant, maintenance staff etc. This list should just be field staff

TODO: Filter worker by position (Currently use bonus position to filer, only field staff has bonus position), then service point——#522

* 1. Can the list only show available employees? IE employees that are on days off, holidays, modified duty etc show up as a different status (color coded) and at the end of the list or not at all??

No. Since crew is only a container, we don’t know it timespan until it is assigned to a job. However, if a crew has been assigned to a job, you want to take someone out and add someone in, by that moment, we can do something smartly. But it is not priority for now. Color code can happen on Worker board which may show the alert for availability of future.

1. Employee positions and statuses should be identified with their names on **worker board**.

TODO: Add position column——#522

1. **Worker board** and **Unit board** do not need to take up as much space on the screen.

TODO: Shrink the two boards after filtering to get less data——#522

1. Each worker should have a “profile” which can display specific orientations, restrictions, etc. that can be edited by the managers.

TODO: Add worker profile，only one text file for now call “Note”。We may enhance in future, may be integrated with LMS.

I was hoping for more of a drag and drop to create crews. These boards don’t really serve much of a purpose besides just displaying available equipment, and since we have ALL employees and ALL trucks on each board, it makes them 4-8 pages depending on the district. Thus, scrolling through them to see a name that you will just be picking from a drop down list anyways might be a fruitless endeavor.

After the data being filtered properly, long list concern will be relieved. Drag and Drop will be a nice UI in future, however I think we may possibly change the crew concept a little bit during the discovery of requirements. Currently we are still building the backbone of the system. Will be juicy soon.

In order to keep the Unit board and Worker boards as neat as possible we should consider creating a separate page that managers keep up to date, that lists all employees and equipment. The managers can designate which resources are active, which are not, which have restrictions etc. They can also pair tractors and trailers. This is what we would use to create the Unit Board and Worker Board on the Resource page.

From the description here, I think we must extend the discussion of crew definition. Let me think about it and back to talk.

**Crew Board**

1. Each crew should have a 2nd, blank row below for the notes field. Current format does not allow for enough information to be added.
   1. The column “notes” can be repurposed for “time in, out, reset @ \_\_\_\_\_\_ etc”
   2. Need to have an ordering system for which crew is 1st out, 2nd out, etc

The column width will be adjusted to balance the needs. Basically Job Info will show where the crew is. We need to discuss the logic for time in, out, and such.

1. Numbering system for crews should be dependent on crew type. For example, instead of crews 1-6 it should be P1, P2, P3 etc for pumpers, B1, B2 etc (bulkers) 3P1, 3P2, 3P3 (3rd party) etc etc.
   1. Using the supervisor or driver’s first name would also be an option for crew identifiers.
   2. Using primary unit number would also work.

TODO: Remove the number column from all board display, it is system sequence no business meaning. ——#527

1. Need to add B-Train as a crew type

Any Crew type if needed can be added easily.

1. When adding crew, home district should default to the page that you are currently on.

TODO: Set up the checked service point as default in home district dropdown list, if multiple service points are checked, use the first one. ——#451

* 1. When adding unit to crew, we should be able to first filter to unit type and district rather than selecting from hundreds of units.

TODO: Filter by selected Service Points, filter out deactivated units, ——#463

1. When adding crew, it gives the option to select Home district. We need to be able to move crews from district to district.
   1. If I am in Estevan, and select Swift Current as home district, I still want the crew to show up on the Estevan board.
   2. If I want to add a crew to LLB that is already created and on the Red Deer board, there should be the option to select that crew, rather than create a new crew and delete from their previous district.
   3. Alternatively, I should be able to right click on a crew and have the option to “assign to another district” and then that crew would show up on the other districts crew list

TODO: add “Assign A Crew to another district” function, details see above ——#529

1. **Job info** column should show client and rig, not call sheet number
   1. Color code for “assigned (scheduled), called out, active on job, on way home, etc.”

TODO: Update job info to show information as above.——#448

1. 3rd Party bulker crew will have to be set up differently as those will not be in the worker/unit boards. Likely have to be able to “free write” these onto the board.

TODO: Third Party Bulker crew need a different design from Sanjel Crew. Entity design refers to Product Haul third party part.——#537

Next step, we are going to update product haul function to use crew than entering unit and driver.

An option that would be more user friendly is if when we “add a crew” we could create the entire crew all in one step, have a window open where we can select crew type, home district, units, workers, then click save. Rather than adding crew, then adding units, then adding workers in 3 separate steps. Then have the ability to right click and “edit crew” rather than always adding and removing workers and units.

TODO: Enhance Create/Edit Crew UI as above.——#451，#534

**Rig Board**

1. Using the assign crew function, we need to be able to select which district we are sending the crew from. Ideally it would default to the local district but should have a drop down to select if sending from another camp.

TODO: Add Crew District Dropdown to Assign A Crew window, default item is the service point of the selected job, when change the Crew District selection, crew list needs to be updated——#454

1. Need to be able to add multiple crews to a job (pumper crew and a spare, bulker, 2nd pumper, etc.) Currently these appear to be able to be added but don’t show up on the rig board crew column.

Due to the space on the board, we only show the number of assigned crew, when your mouse hover the number ,it shows which crews are assigned.

1. Bulk trucks that have been assigned as “going with crew” should show up in this column

NEXT: Update product haul function to assign bulker crew

1. Identifier for the district that the truck is from should also show up in this column. We can’t have Crew 2 from Red Deer and Crew 2 from Edson both just showing up as crew 2. This is why possibly having the supervisor name or unit number as identifier might work better.

TODO: Add Crew Home District in tooltip when mouse hovers Crew number ——#448