

eRoof Development Plan

- Draft copy – May 1, 2010 -

OBJECTIVES

Release 1 - Prototype (May/June)

- Convert Quickbase application to IPP Native app on workplace.
- Folders (grids/ forms/ navigation) with information on clients, facilities, and roof sections.
- Reporting – condition reports, inspection reports.
- Aegis data converted/ uploaded – tables, photos, documents.
- Roles and users - Information services to clients, access to inspectors and contractors.
- Financial planning using MS Excel.
- Map-based navigation.
- Process for Invoice approval and service work history.
- Entitlements, pricing plans, published – trial accounts for beta users, paying account for Aegis.

Release 2 – Commercial release (July-Sept)

- Rehosed to open technologies and development tools.
- Enhanced database functions – referential integrity, queries, stored procedures.
- Enhanced database architecture, sharing between subscribers.
- Direct database access, bulk uploads, backups, file uploads.
- Programmable server functions (PHP, ASP.Net, Java) – report writer, etc.
- Additional processes – inspections, leak response, warranty management.
- End-user customizations – database, UI, reports.
- Mobile device support, location-based data entry and retrieval.
- WEB Site marketing and support systems.
- Market-driven enhancements (beta accounts)
- Keyplans.
- CAD drawings – display, creation.
- Commercial launch in fall (not all features)

PROPOSED METHODS

- Affilia to investigate supporting technologies and be responsible for architecture, programming methods, software quality, code re-use, object-oriented approach, performance, security and development methods to minimize costs and maximize ease of maintenance.
- EBS to focus on business analysis, value proposition and working with beta accounts.
- Work together to develop component specifications and task descriptions.
- Components and coding examples should allow independent application development and maintenance by a non-technical business analyst.

Next Step – Learn the Intuit Flex SDK [Programmers Guide](#) [API Reference](#)

- Evaluate and make final decision to use for prototype

Set up development tools

- Skype
- Source code access
- Project management?
- Communications?

Quickbase/IPP Review (Jim)

- Applications, Tables, Fields, Relationships.
- Reports and Forms.
- Photo displays – using calculated HTML.
- Roles and users.
- SDK setup, DTO generation, IDNForm example from CloudJam.
- SDK documentation.
- The Aegis Quickbase app – tables, reports, forms, roles, maps.

DTOs

- Retrieval – display a grid, column selects, filtering, roles applied?
- Updating.

DTNForm/ DTNField

- A quick prototyping tool.
- Test with Quickbase fields – display, input validations (as below)

Field classes

- AbstractField and subclasses
- Understand the design process – generated behaviour from QB field properties, versus Flex coding.

Additional specifications will be developed after we have decided to proceed:

- Forms and supporting components.
- Grids, with integrated forms.
- Parent-child functions.
- Reporting.
- Data import.
- Navigation – tabbed folders, trees.
- Map usage.
- Financial plans with MS Excel interface.
- Roles and users.

Quickbase fields and required controls (to be completed)

Field Type	Aegis Usage
Text	
Text Multi-line	Set width Set height Add to previous content
Text Multiple-choice	Fix select list defined in the Quickbase field. Alpha sort, or “as entered” User ability to add new values. Values from another table – such as parent records.
Numeric	
Numeric - Currency	
Numeric – Percent	
Numeric – Rating	
Date	
Date / Time	
Time of Day	
Duration	
Checkbox	
Phone number	
E-Mail address	
User	Not required
File Attachment	
URL	
Report Link	Not required
iCalendar	Not required
vCard	Not required
Predecessor	Not required
Formula – Text	Thumbnails
Formula – Numeric	
Formula – Date	
Formula – Date / Time	
Formula – Time of Day	
Formula – Duration	
Formula – Checkbox	Not required
Formula – Phone Number	
Formula – Email Address	
Formula – User	Not required
Formula – URL	
Relationship – Reference	Link to parent
Relationship – Summary	Roof area, total value
Relationship – Count	# sections
Relationship - Lookup	Client name, facility name, section designation, allowed users

Programming Task Details

DTO

- Display all Facilities data in MX:Grid
- Apply column selections to display facility name, address, city
- Apply filter to display data for selected client.
- Revise data using ActionScript.
- Update to Quickbase.

IDNForm/ IDNField

- Set up a test table with all required field types.
- Display all facility fields using DTNForm
- Display only FacilityName, Address1 and City

Field classes

- Apply field classes for all field types – allowing individual field positioning.
- Test required formatting and validations.
- Visual form design?
- Roles applied?
- Integration of view, add, edit functions?