

## Affilia Discussion Notes

April 27, 2010

### Objectives

- Shared learning – Quickbase, Flex, Flex SDK, native app publishing.
- Co-created development resources – components, programming standards, etc.
- Evaluation of Affilia as a development partner for “eRoof release 1” in May/June.

### IPP functions required - immediate

- Architecture – menu system, windows, dialogs, WEB site integration, client-side data, etc.
- Controls - to support Quickbase field types – DTO, DTNForms/ DTNField, individual controls.
- Photos – versions, uploads, multiple file uploads (records added), thumbnails.
- Documents – versions, uploads, display.
- Grids – fixed width, sorts, filters (programmed and user), paging, record selects, deletes.
- Forms – view/ add/ edit, attached to grid, view details on selected record.
- Navigation and containers – client/ facility/ section select, navigation tree, tabbed forms.
- Parent/child operations – automatic setting of parent link, cascading deletes (with warning), parent lookup.
- Reporting – multi-level parent/child data, grids, forms, photos, paging, orphan control.
- Mapping – address lookup, exact location entry, site plans using satellite images, maps as a navigation system – select facility → select the roof → link to Flex detail screens.
- Roles and users – menu rights, field rights, content filtering.
- Entitlements – # users, capacity, features, trial accounts, expiry and upgrade messages.
- User admin (by subscriber) – invite, role assignment, usage analysis.

### IPP functions required - future

- Subscriber and end-user customizations – database content, grids and forms, custom reports.
- Mapping – markup with graphics and text, layers for job progress, photo icons.
- Keyplans – creation, usage; CAD drawings – view, create.
- Mobile usage – location-aware data display, photo capture, roof sketching.
- Process design – managed processes with functions for various roles – such as invoice approval, where contractor enters work completion with photos and invoice, the consultant reviews and approves, and the client issues the payment.
- Styles, skins, enhanced branding.
- Server-business logic – data sharing between subscribers.

### The first release – May/June (itemized tasks/ specs/ budgets required)

- Flex UI – menus, navigation, grids, forms.
- Aegis data import, photos upload (approx 1000).
- Roles – admin, internal, inspectors, clients, contractors.
- Facility condition report.
- Inspection report.
- Financial plans – 10 year budgets for repair, maintenance, and re-roofing.
- Mapping – address display, client facility display, sitemap display.
- Private beta – marketing messages, registration and provisioning process.
- Private commercial – Intuit QC process, Intuit payment process, Aegis as first account.

### Other

- The Intuite/IPP decision/Native app decision - versus other PaaS providers – Azure, etc ??
- Partner approach – Business-focused, making money together, shared risk/ reward.
- Supplier approach – Task-focused, fee for services, an expense to the project.