**Affilia Work Plan – Week of May 24**

**Client Deliverable**

* Condition Reporting System – with supporting forms for view/ add/ edit/ delete. – Not Clear
* Saved reports.- Not clear

**TASK #1 - Complete Reporting** (1 day)

* Amazon setup.**Done**
* Photos – from Amazon.(Fotos are read from IPP now not in Amazon)
* Data from tables. Partially Done. Need clarification where to take each field for each entry of the report.
* Save to database – Create a record in the Facility Documents table.Not Clear
* Report designer that will allow changes by EBS. Not in this iteration

**TASK #2 - UI prototype/ standards - menu, controls, grids, forms** (2-3 days?)

* Build a prototype that demonstrates the IPP abstractField class and related sub-classes that use Quickbase field properties to control the Flex UI.
* The prototype will capture the best design ideas from Jim, Boris, Valery and represent the standard for our application to ensure a consistent UI design.
* The intention is also to allow development/maintenance of grids and forms by EBS to allow Affilia to focus on mapping and other functions.

Menu System

* Two levels, as in MS Office apps. Prototype will be done, but need discussion and more understanding of the business

Dashboard Admin Facilities Analysis Process

* Code structure based on menu system? Need clarification

Controls.

Will create test table that would have all data types possible in the application and will prototype controls against this table. Will be done this week.

Develop control samples using IPP SDK to apply QB field properties for labels, formatting

and validation. Use the Sections table and create a form that can be used for view, add, edit.

* Text field – Designation - single line – Max 10 characters, required input.
* Memo field – Condition Details – 6 lines, 40 character width.
* Memo field – Sensitivity Details – 4 lines, 40 wide, append mode
* Numeric – Sq Ft – no decimals, QB property Units “Sq Ft” displayed?
* Currency - Est Cost per Sq Ft – 2 decimals
* Calculated – Est Cost = Sq Ft \* Est Cost Per Sq Ft – should redisplay when inputs are changed. Is the Quickbase equation be applied in the Flex UI??
* Date – Date Installed – input using calendar.
* Select list – Roof System – select values from Quickbase.
* Select list – Slope – select values from QuickBase, allows user adds to the select list.
* File uploads – Photo – Upload to Amazon? 150x150 image on view form
* File uploads – document – Test Doc – upload controls for add/ edit, link in view form

Questions

* Can we generate thumbnails (reduced size images) to improve performance? Need clarification
* Should we develop our own control classes to standardize? Yes
* Can Flex support RTF content? No, can support partial html tags
* Can we combine the view, add, edit controls into a single control that reacts to a “mode” setting? Would reduce the coding requirement and enhance maintenance. Yes, it is possible. Need to discuss the benefits of it. We think it would only complicate things

Grids – OK. Will be done

* Set up a Grid under the Analysis menu.
* Display all roof sections – with columns ClientName, Facility Name, designation, size, system type.
* Set page size to 100 records, and let the user navigate to first, prev, next, and last pages.
* User-defined filters (single field only) – user selects a system type – selection list to show the system types in the grid (all pages) – grid re-displayed with the selected records – option to clear filter/ display all.
* User-defined search – position within a sorted column – for example – find a client – partial match – ideally it would position as letters typed.
* Can Quickbase field properties be applied in Grids – column headings, formatting, etc.
* Can Quickbase roles be applied to control column visibility? Yes
* Are in-place edits supported? For a cell/ row/ multiple records?. For Cell – Yes, For Row and multiple records is not standard functionality
* Are multiple record adds supported using a Grid – for example add roof sections using a grid to enter designation and sq ft. Need clarification
* Indexing? Need clarification
* Single record delete – right click on the record – select delete from pop-up menu. Right click in Flex is not working well.

Roles and permissions

Yes, we already know how to do it. Need to discuss. There are two ways to do it in IPP. First use selects which role he wants to use, second application just checks which roles user has and give all the permissions from combine roles.

* Set up a Client role and a Client user.
* Set and test Client permissions:
  + Not allowed to view Est Cost Per Sq Ft and Est Cost – these fields should not show on the view, add, edit forms – and subsequent fields should move up on the form.
  + View only on the designation – This control should be display only on the Edit form.
  + Add not allowed – The Add button (or pop-up option?) should be disabled or not displayed.

Parent-Child Issues

* Referential integrity (delete). Should application do any deletes? We better mark things as “deleted”
* Cascading deletes.
* Grid-Form: Grid with summary, Form with details on the same record
* Grid-Form: Grid with parent

**TASK #3 - Database Design** ( ½ day) – #1 priority. Need to do it.

* Review current database design.
* Define DTO requirements.
* Discuss/finalize wrapper design.

**Prelim work plan for next week**

All

* Review Use Cases, establish budget and deliverables for Release 1 (3 weeks to go!)

Affilia

* Mapping/ drawing enhancements – layers, integration to data.
* Mobile inspections data transfer from iFormBuilder and integration into map displays.
* Mobile inspections dictation screen – voice play-back with pause, text entry.
* Report designer.

EBS

* Complete database design, menus, grids and forms.
* Create iFormBuilder forms for condition reports and project inspections.