# OnSiteXI

### Work Order Updates

* CrewNo. Replaces WONo. for KN.
* SE WESLACO: WO’s replace WONo. With Mileage
  + Weslaco Techs log unit numbers, notes and mileage for SESA Trucks
  + Perhaps add diagnostic checklist for all units serviced here in Weslaco
* Work Report Entry is customizable by client: this allows for a cleaner UI (only relevant fields are displayed…)

### Add incomplete Reports tab

* reports without Unit No., or WO No. are persisted until completed (this does not affect hours for payroll, since the report exists -only that the user will know that it is still incomplete)

### Add Manager Mode

* Schedule summary, detail view, summary and detail per site;
* We can add other features as well -suggestions?
* We need to define all features before we can determine timelines and such.

### Add Timesheet Capture and storage

* Halliburton sites: Techs can capture/upload timesheets

### Badges: awards

* Badges and awards to show up on user home-screen (increase morale, allow managers to give awards for outstanding accomplishments… lots of ideas
* Primary Badge (Tech Class) displayed on Home Screen

### Batch work-order entry mode

* Add multiple WO's, Units, Notes, time on one screen
* Perhaps set this as “Advanced Mode” Option
* Entire shift can be entered on a single screen much like the old website
* Not limited to 9 WO’s/Units
* “+” button to add additional WO for that day
* Entire Shift can also be edited with the same UI (where work order number or other details might need to be added later…
* Can set hours for a repeated task for several units
* Ex: 6 units with the same task performed, time set for the entire group
* Time is divided by unit (this works out better, since individual reports are limited to 30 minute increments and a short task repeated for several units might only require 15-20 minutes per vehicle.

### Enhanced Profile

* Add avatar or image,
* Edit phone number,
* Edit Address,
* Edit Preferences…

### In-app Messaging

Msg other techs, managers, site-mates etc. Useful to reply to mgmt. msgs, report safety issues, request sick day…

Messaging extended to OnSiteConsoleXI:

* Automatic Groups –Worksite groups are automatically generated from schedule,
* Msg to individual or group
* Typical chat interface:
* Txt msgs at first;
* Full MMS TBD;
* History and DB TBD…
* Again, we need to do a little research and define this module’s parameters before determining timeline.

### Missed Hours and Reimbursements

* Reports for missed hours: include fields for number of hours, dates of missed hours, description, … reimbursements: description, Date, amount, image capture of receipt… other fields TBD

### Payroll summary detailed

* add deductions and estimated take-home pay instead of just raw hours (on Home Screen –Payroll Period summary)

### Check-stub summary tab

* Shows actual payroll detail after payroll is run (export summary report from QuickBooks); this way the techs shouldn't need to come to the office to copy pay stubs
* Details for deductions etc. can be configured in OnSiteConsoleXI
* Possibly some configurations editable by employee (synced to DB)
* Exportable report for manually updating QuickBooks on changes from Employee
* Need to see export options from QB to see how this will be uploaded from the console…
* Feasibility TBD

### Log Shift Requirement

I’d like to revisit this; although it is another to-be-enforced requirement for the technicians

* Logging a shift sets the user active for a specific shift
* Setting a shift to active can also take a geolocation reading at time of activation
* Better Payroll tracking (we know if a tech is missing a report, or if they didn’t work)
* Optional log start and end of shift for better shift time tracking

### Performance optimizations

* App queries current and previous payroll period DB's plus incomplete reports DB(s) other optimizations to improve performance... Reports DB by week: create a new reports DB for each payroll period. DB name is "reports" + excel payroll period date number; ex: reports43068

### Preferences stored per user, online

* Update how user preferences are stored and retrieved; editable fields etc. This needs a bit of an overhaul for consistency and accuracy across the app and console

### Stats page

* Awards/badges, time-in-service, consecutive days worked, hours worked by week/month/year… perhaps some other statistics that the techs might like to see

### UI Themes

* Dark/Light, perhaps color options as well; themes for OnSite UI

### Update home screen UI

* change shift summary look/feel for better summary
* font and UI update

### Update Reports UI

* cleaner UI; eliminate unused UI elements; change some graphics; improve look and responsiveness
* converts start/end times to account for this break in the day
* KN units DB completion for Units/Crew Number (auto-complete option)
* KN unit number verification with DB
* Prefixed Units (HP-, BL-, TR-,…) prefix can be selected and just the number needs to be added
  + Toggle or some such UI for numerical unit number, or prefixed to see prefix options…

### Vacation/Time off Requests

* Add Time Off request page; track vacation/time off requests through App and Console *Time Off* Approval/Denial + manager comments viewable; resubmit/Date change suggestions can be tracked

### Update geolocation functionality and discussion

Realities of current work environment:

* Phone usage is discouraged at many sites and "app" usage even if legitimate may be suspect by client.
* Compliance enforcement is also an issue.
* Currently we are still only in the 95%-98% in getting reports in before payroll.
  + It is fruitless to add another requirement which can be ignored...
* Currently: Geoloc is superfluous. Techs typically do not access the app during shift hours
* Geo-stamping can only happen when the app is accessed.
* If App is used at the hotel, then only the current city is known (not whether or not the technician was at a worksite).
* It is not legal to *force* geotracking on personal devices (could only be enforced on company issued devices...)
  + We need voluntary compliance
* Possible options: require image capture of UnitNo: geostamp is recorded on unit.
* Alternately, WorkOrder image capture with geostamp...
  + We should still clear this with the clients so that our techs are not hassled for using their phone
* Clear this with clients so that they understand the reason and purpose of photographing the unit numbers

Usefulness of geotagging is not in question

* Automatic Travel Reports
* WorkSite Verification
* Tech Location Verification
* Shift Verification

Voluntary compliance is the only legal way to gather this data without issuing mobile devices or a legally vetted employment contract which explicitly states geotagging requirements and compliance and usage guidelines.