PMA Tracker Website Owner’s Manual

URL To Site: <https://pmatracker.com>

System Administrator: Dylan Oldham

Written BY: Dylan Oldham

May 4th 2018

Table of Contents:

Owner’s Manual Statement……………………………………..………………… 3

Part 1 – The Main System Tabs…………………………………………………….4

Part 2-Admin Functions…………………………………………………………….9

Part 3-Inspector Remote Function………………………………………………...12

Special Notes……………………………………………………………………...13

**Owner’s Manual Statement:**

This system is built for the sole purpose of making the PMA manager’s job at Signature Building System easier and more efficient. Every PMA operation needed can be done with this website. We will go over each one in detail later.

However, it’s important to understand that this system is dependent on correct and timely use. If this system is not used or updated, things will go wrong. Much of this system works on the date of a last action as a point of reference.

This system’s ultimate goal is to have no accounts over 1 year since last service. Other than this, the goal of the system is as stated above to make the whole process of PMA Management easier and to have one point of access for all operations needed.

**PART 1: The Main System Tabs**

Current Tab:

This is a list of PMA accounts that are current. This means they’re under 6 months’ time since the last PMA was conducted. This works on the date field in the database which is updated every time a PMA ends (A section we’ll talk about later).

This list is in alphabetical order. This can be used if a client calls and wants to know the last time their building was serviced to confirm they’re current. Or this is good for upper management to see and analyze how many accounts are current vs. not current.

Ready Tab:

This tab is probably the most important to the system, and this is why after login you’re directed to this section. Here is where you see the new accounts and more importantly the accounts that are past due.

This section is ordered by dated, oldest to newest. However, on the top are new PMA’s that do not hold a date yet (More on new PMA’s later). The color coding is as such: Dark red are PMA’s that have gone over 1 year without service and have become a legal liability for Signature building systems. Light red are accounts over 6 months old but less than one year old.

The “Move to in progress” button to the right of the page on every account moves an account into the in progress tab when pressed. You’ll first be asked to confirm you want to move this to in progress via a pop up window.

Once you agree you’re directed to a form which asks you to input information needed for an in-progress PMA. Building owners name, phone and email are asked to be input. Also, the inspector's working the job will be asked.

It’s important to understand this page works on the “date last completed” field as a reference. If an account is not properly moved into in progress when it’s supposed to it can cause harm to the system. Every time you start a PMA you must go through the move to in progress system. It’s a less than five minuet task.

In Progress Tab:

This is an important section that allows the PMA manager to have all the information needed for an in progress PMA in one place. The information input after moving a PMA from ready to in progress will now be accessible here.

On this tab a list of accounts in progress will be produced as links. When you click on the PMA name a page with the name of the building contact, his or her phone number and his or her email will be produced. The email is linked so all you need to do to email the client is click on the email.

Also the inspector’s name, numbers and emails will be produced as well. This is important because it’s all the information needed to manage a PMA that is in progress in one place. There is an “End PMA” button to the right of each account.

The End PMA button does two actions in one. Before ending a PMA you will be asked to verify its end such as you did to move a PMA to in progress. When you do that the date will be automatically updated to the current date (which automatically puts it into the current PMA section) and then you’re re-directed to a historical form.

More will be spoken of later on the historical section, but this form you’re directed to after ending a PMA will ask you to input all the PMA’s information. This information is sent to a separate non dynamic database that cannot be changed.

Add New PMA Tab:

This is a fairly simple tab and is for adding new accounts. New accounts do not have existing dates so you’re simply asked to put in the PMA’s name and estimated days it takes to complete this PMA (this can be based on number of floors or devices etc.). After submitting this new PMA it’s put on the top of the Ready tap in the clearly noted new PMA section.

Reminders Tab:

This section is simply to help the PMA Manager with any notes he or she may have. There is a simple input box where the user can add a note and upon pressing submit the message is added to the same page. A button comes to the right of the note that allows the reminder to be deleted from the page when the note or reminder becomes irrelevant.

Historical:

This section holds the information submitted when a PMA is ended. It’s data in a separate non dynamic database that cannot be changed. This is a historical log of all completed PMA’s. This is vital if you need to go back a long period of time and see information on a particular PMA.

The user is not allowed to change data on this section and it’s ordered by entry date. Side note: pressing “ctrl + f” will open a text search box in any browser. This will allow easier searching in case you need to go years back or find a particular account by name.

Schedule Tab:

This tab will help organize the PMA manager by allowing him or her to input and view weekly schedules. When this tab is clicked the PMA manager is shows a form for inputting a schedule, one inspector/day at a time. Job number, job name, date and inspector will be the input boxes.

When submitted this information pops up under “Recent Entries” above the form. This Recent entry section only lasts 24hrs and was put in place so the PMA manager can keep track of who he has already scheduled during the scheduling process.

On the top of this page is a blue button that reads “See Schedule”. Once all the schedule entries are made, pressing this button will produce a nice looking table showing the schedule for the week.

This table will be shown for 7 days after the schedule is created so it’s important to make the schedule each week. The value of this system is that it’s easier than excel to make. Also, it’s more readable then Signature Building Systems current excel scheduling system.

Inspector Logs Tab:

This is an important section for the PMA manager and upper management to see daily progress reports from the inspectors. It is information that is submitted by the inspectors remotely from cell phones. That process will be discussed later in the Inspector specific section.

It’s important to allow upper management user access and direct them to this tab so at anytime and anywhere they can review inspector logs. This is a better system than email. With email the inspector has to cc everyone who is requesting to see logs, and whoever is receiving this information will have to sift through separate emails. With this tab all the information is instantly produced anytime someone has access to the main site.

Delete PMA Tab:

This is a simple tab. It lists all our PMA’s with a “Delete Client” button to the right of each one. When this is clicked a “Confirm Delete” window will pop up and on pressing “OK” all the information from that PMA will be wiped from the system.

Please note it will NOT be erased from historical logs as that is a separate untouched database. Please take caution with this tab as it erases all the dynamic PMA information for that specific client. I’ve highlighted this section red to signify its importance.

**Part 2: Admin Functions**

The Admin tab is a place for making common changes or updates to the system without having to physically change the code. This is a vital section and will need to be used for several important tasks. There is only one set of login credentials for this section and it is as such:

Username: sbsadmin

Password: signature97

\*please note these are both lowercase and no other credentials will work for this system. Also, there is no navigation bar in this section, only an admin logout and back to admin tabs are there for safety reasons. Please make sure these credentials do not fall into the hands of someone who does not understand how to use the Admin section.

Add Existing PMA Button:

This allows you to add an existing PMA that, for whatever reason, was not in the system. This can also come in handy if a mistake is made in the system and you want to delete that client and add a correct date. For example if you forget to put a client through the in progress process for a long period of time and the date is far off you can delete the client and then add it here with the correct date.

These PMA’s work off the date completed field so it’s important to note that this date needs to be added correctly as such: YYYY-MM-DD. This is noted as a placeholder in the field for extra clarity, but please notes how important this is.

Add New User Button:

This is a simple section that allows you to add new users to the system. This will allow access to the main site and inspector login. However, inspectors will not have access to the main site. This is set up internally when an inspector is added to the system.

You simply add a username and password and then click submit. After this you’ll see a confirmation message and those credentials are good for use in the system. Please note that these passwords are hashed in the database for safety meaning even someone with access to raw database fields in a web host cannot see the passwords as they’re encrypted. Thus it is important to remember the password chosen.

Update Days Taken Button:

Because the days taken to complete a PMA is varied and many now hold the value of Unknown this section allows the system user to edit the field. Upon clicking this button a list of clients is produced with an “Edit Days Taken” button to the left of each one.

When this is clicked a simple form to update the field is produced. Upon submission you’re taken back to the main admin page. After this all entries of this PMA everywhere in the site will have the days taken field to read what the user input.

Add New Inspector Button:

This process is the exact same as add user except behind the scenes special entries are made to identify this person as an inspector not a main user. Adding an inspector will automatically add them to the dropdown list of inspectors in the schedule section and in the inspector log form which will be talked about in part 3. This also restricts this person from main access to the site.

Ever inspector has a distinct person type ID that is dynamically added when you add them in this section. This is to identify them as inspectors and not as a building contact or office employee. Also, an “isActive” value of 1 is added to the person field to show that they are an active employee. Upon removing an employee this is updated to 0 thus meaning they’re taken out of the drop down menus. More on this in remove inspector button below.

Remove Inspector Button:

This section, as stated on the button, removes an inspector from active employment. It does not remove them from the system however to preserve historical records. Because removing an inspector is an important decision you’re asked to type the inspectors full name before removal.

What happens on the backend when this is done is the employees “isActive” field in the database is turned from 1 to 0. When an employee is 0 (or false in computer science terms) they are taken out of the drop down menus for scheduling and the inspector log form.

**Part 3: Inspector Remote Functions**

A separate part of the system has been set aside for inspector use. The section allows the inspectors to remotely to log daily job statuses. This is important for the PMA manager or any upper management to get a daily report of how a PMA that is in progress is going.

The section is built specifically for cell phones and remote access but can be viewed on desktop as well. All inspectors must save this specific link to their cell phone for access to this system:

<https://pmatracker.com/inspectorLogin.php>

When this page is reached it will look like the main login but say “Inspector Login” above the login form. It’s important to note you need to give an inspector login credentials in the “Add user” button of the Admin page in conjunction with the “Add inspector” button so they can have access to this site.

Once the inspector is logged into this section a form is produced so they can remotely log their daily work. This data is sent to the inspector logs section on the main site. This system is an easier alternative for both the inspectors and the office staff viewing the logs.

The form is set up so every field must be entered before submission. The fields are as follows: a dropdown to pick which inspector they are. A “Building” field where the inspector will log which building they serviced on that particular day. A “Description of Work” filed where the inspector describes what happened. Also, a “Floors Serviced”, “Discrepancies/issues” and a “Days Left” field are shown as well.

Upon submitting all this data the inspector is given a “Thank you for logging your work” message and re-directed to their login page. This message is important as seeing this confirms the day was logged successfully. Should they see another message please contact the administrator. It’s important that the inspectors use this section every day. It is dependent on their use, not the office use.

**Special Notes:**

Common System Issues:

* From time to time mistakes may be made like accidently not pushing a PMA through the line of ready-in progress-End which will make the date field off. Since the system works off the “Date Last completed” section my suggestion is this: Delete the client and go to the “Add Existing PMA” section of the admin page to re-insert the client with the correct date. This will allow the system to function properly. However unless the date is a month or more off or more I would not suggest doing this as it does not become a big problem unless the date is way off.
* Always remember when adding an inspector you must add a user as well. This allows them access to the inspector login on their cell phone. They will not have access to the main site.
* IMPORTANT: you should never see the message “Error: Contact Administrator” if the system is functioning correctly, but if you do please contact me, Dylan Oldham, at 917-717-2721 or [dylanoldham326@gmail.com](mailto:dylanoldham326@gmail.com) for support. I can access the webhost and fix the issue very quickly in most cases. However, you will most likely never see this message.