The following updates are required for the application as of the date of these meeting minutes.

# Recourse/DPS

## Add New Record

* Move the green PIMS data box with the PIMS data in between the “Search” box and the “Original Request Data” box.
* Create a unique tracking number that would be applicable to the record being updated within the “Original Request Data” box and the “Follow-up Data” box [this is why these 2 boxes should be next to each other on the screen] and have that tracking number be at the top of the “Gray” box (this unique number should NOT be editable by the user)
* The “unique tracking number” should be created when the user clicks the “Add” button to add the record

## View/Edit

* Create a search box for the user to select one or more of the following criteria BEFORE the DPS records are retrieved
  + Account #
  + Date Range [e.g. there would be a “Date From” and a “Date To” field]
  + Portfolio #
  + Responsibility
  + Record Number [this would be the “unique” record number that was created by the system when the DPS record is added
* Once the tabular view of the filtered records have been displayed, create an “Export to Excel” button so the user can export the list to excel [if they want to do that instead of viewing any one of the particular records]
  + The Excel export file should contain EVERY DATA ELEMENT that would be on the “View/Edit” screen as a column within the Excel file
* Since the “Add New Record” screen layout had the green “PIMS” information above the “Original Request Data” box, then the edit screen should also be laid out like that for consistency
* Create a “…Record X of Y…” scrolling capability like you have in the “Portfolio” screen [see screen capture below] so that the user can scroll through potentially multiple records within the one account.



* + When a user uses the “horizontal record scrolling” with the functionality shown above, both the “blue box” and the “gray” box would scroll with the information since both of those boxes would have related information. The green PIMS box of information would stay constant for any of the DPS records that may be associated to the selected Portfolio

# Recourse/Media

## Add New Record

* Create a unique tracking number that would be applicable to the record being updated within the “Follow-up Data” box and have that tracking number be at the top of the “Gray” box (this unique number should NOT be editable by the user)
* The “unique tracking number” should be created when the user clicks the “Add” button to add the record

## View/Edit

* Create a search box for the user to select one or more of the following criteria BEFORE the Media records are retrieved
  + Account #
  + Date Range [e.g. there would be a “Date From” and a “Date To” field]
  + Portfolio #
  + Responsibility
  + Record Number [this would be the “unique” record number that was created by the system when the Media record is added
* Once the tabular view of the filtered records have been displayed, create an “Export to Excel” button so the user can export the list to excel [if they want to do that instead of viewing any one of the particular records]
  + The Excel export file should contain EVERY DATA ELEMENT that would be on the “View/Edit” screen as a column within the Excel file
* Create a “…Record X of Y…” scrolling capability like you have in the “Portfolio” screen [see screen capture below] so that the user can scroll through potentially multiple records within the one account.



* + When a user uses the “horizontal record scrolling” with the functionality shown above, the “gray” box would scroll with the updated information. The remaining 3 boxes of information would stay constant for any of the Media records that may be associated to the selected PIMS Account

# Recourse/Recall

## Add New Record

* Create a unique tracking number that would be applicable to the record being updated within the “Follow-up Data” box and have that tracking number be at the top of the “Gray” box (this unique number should NOT be editable by the user)
* The “unique tracking number” should be created when the user clicks the “Add” button to add the record

## View/Edit

* Create a search box for the user to select one or more of the following criteria BEFORE the Recall records are retrieved
  + Account #
  + Date Range [e.g. there would be a “Date From” and a “Date To” field]
  + Portfolio #
  + Responsibility
  + Record Number [this would be the “unique” record number that was created by the system when the Recall record is added
* Once the tabular view of the filtered records have been displayed, create an “Export to Excel” button so the user can export the list to excel [if they want to do that instead of viewing any one of the particular records]
  + The Excel export file should contain EVERY DATA ELEMENT that would be on the “View/Edit” screen as a column within the Excel file
* Create a “…Record X of Y…” scrolling capability like you have in the “Portfolio” screen [see screen capture below] so that the user can scroll through potentially multiple records within the one account.



* + When a user uses the “horizontal record scrolling” with the functionality shown above, the “gray” box would scroll with the updated information. The remaining 3 boxes of information would stay constant for any of the Recall records that may be associated to the selected PIMS Account

# Portfolio Module

## Top Part of Portfolio Information Screen

* Use the information previously provided with the “Access to SQL Conversion” Excel file sent on 12/28/2012 to update this part of the form

## Bottom Part of the Portfolio Information Screen [the area with the multiple tabs]

* Update the “Sales” tab with the information previously provided with the “Access to SQL Conversion” file sent on 12/28/2012
* Update the “Notes” tab with the information previously provided with the “Access to SQL Conversion” file sent on 12/28/2012
* DELETE the “Collections” tab functionality - - it is NOT REQUIRED. The information that would be provided in this tab is already covered in the “Reports” functionality accessed from the Left Navigation reports capability
* REMOVE the “Investments”, “Distributions”, and “Interest” tabs from the “Portfolio” module and place them under the “Investor Management” top-line navigation module

# Investor Management Module

## Top Part of “Investor Management” Information Screen

* This screen should look IDENTICAL to the existing “Portfolio” screen, but the name should be “Investor Management”
* Use the information previously provided with the “Access to SQL Conversion” Excel file sent on 12/28/2012 to create and update this part of the form
* The functionality and layout of this information should be IDENTICAL to what you have for the top portion of the “Portfolio” module

## Bottom Part of the Investor Management Screen [the area with the multiple tabs]

* Use the information previously provided with the “Access to SQL Conversion” Excel file sent on 12/28/2012 to update the “Investments”, “Distributions”, and “Interest” tabs
  + You have likely ALREADY made these updates from within the “Portfolio” form, so this should ONLY be a “movement” of where the tabs are currently accessed from