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## JD’s Babbitt Bearings functional specifications for Add Job / Edit Job Details

## overview

The JD’s Babbitt Bearings product allows managers and employees to manage and create Jobs, add parts to them, and set job parameters.

## UI 1 – Current Jobs

The Current jobs screen will provide the user with a list of Jobs along with some corresponding details. The individual jobs may be selected to drop them down into a list of the parts for that job. There will be an Add Job button (protected with a PIN login) that brings up the add/edit job details ready to create a new job. There are two views to this: the “Big Board” view and the “All Jobs” view. They are functionally identical; just the presentation is different. See the mocks for details.

* 1. Job Number. Clicking the job number will direct the user to the Add/Edit job screen
  2. Parts. If the user clicks on one of the parts of a job they will be taken to the corresponding workflow.
  3. Search/Filter/Sort. Users can sort by customer, part type, due date, job creation date. Users can search by JD Job #, customer name, customer code, item code, PO, and all dates. Users can filter by job status, customer, and presence of final drawing.

## UI 2 – Add / Edit Job (Details)

The Add Job / Edit Job Details screen will provide several different functionalities to the user. The user will have the ability to view the history of a job and all relevant details. The user will also have the ability to delete a job. This screen also provides the user with job specific information (Customer, Contact, etc.) which the user (manager) may update/edit.

* 1. View History. Clicking this brings up the Job History screen.
  2. Delete Job. With management authority, and with an are-you-sure prompt, will delete the entire job
  3. Customer. Dropdown shows all of the customers in the system.
     1. Add button allows the user to create a new customer. Brings up the add/edit customer dialog
     2. Edit customer button brings up sign-off prompt requiring Manager access. Allows user to edit the selected customer
  4. Contact: displays the current primary contact for the selected customer.
     1. Add button brings up the Add Contact pop-up
  5. JD’s Job #. Shows auto-generated job #.
  6. Customer Job # Allows the user to enter the customer’s ID
  7. PO #. Allows the user to enter the customers PO
  8. Date Received. Defaults to today but allows the user to select the day the job was received
  9. Date Required. Allows the user to select the date the job is deleted.
  10. Estimated Ship Date. Allows the user to select the estimated ship date
  11. Time: radio buttons for straight time vs overtime
  12. Hold For Customer Approval. Clicking this influences the job’s status in the Current Jobs display accordingly until this is unchecked. If a job has this status, it is in a different color on the Big Board.
  13. Quote Only. Clicking this influences the job’s status in the Current Jobs display. Only incoming inspection may be completed until this is unchecked. If a job has this attribute, it shows up as a different color in the Big Board.
  14. All Parts require UT / PT. If checked, this sets all uncompleted parts Required UT / PT attributes. If a part is completed already, changing this job attribute does not affect it. Newly added parts to this job will inherit this attribute.
  15. Show All Parts’ Outgoing Dimensions Forms – Show a printable list of all this jobs’ parts’ outgoing dimensions forms so it is easy to view or print all of them at once.
  16. Add New Part: has a dropdown of all the available parts (Slinger Ring, Babbitt Bearings, etc.) Clicking this button brings up the Add New Part dialog.
  17. Add Customer Sizes button per part: make it easy to add customer sizes to each part. Clicking it brings up the incoming size dialog.
  18. Parts – list of the parts that make this job up. Each part has an edit button and a delete button (requires sign off and Manager skill to delete)
  19. Job Notes. Any job-level notes are visible here.\

## UI 3 – Job History

If the user clicks the History button they will be brought to this screen. Here the user is presented with relevant information about the history of the job along with the corresponding dates and processes.

## UI 4 – Customer Add/Edit

If the user clicks either the add button or the or edit button they will be brought to this screen. Here the user has the ability to input and edit existing information about a particular customer.

* 1. Company Name
  2. Company Code
  3. Primary Contact
  4. List of contacts with add/edit buttons
  5. Contact Phone
  6. Contact Email
  7. Billing Address
  8. Shipping Address

## UI 5 – Contact Add/Edit

If the user clicks either the add/edit button they will be brought to this screen. Here the user has the ability to input and edit existing information about a particular contact.

* 1. Company Name
  2. First Name
  3. Last Name
  4. Phone
  5. Fax
  6. Email
  7. Contact Notes

## UI 6 - Add New Bearing (Sub scren 1)

The Add New Bearings screen will be brought up when the user clicks the Add New Part button. Here the user will be provided with a means of adding additional bearings to the job. The user will input the item scope, provide the necessary scopes, identify the bearing type, and add the identifying information. The user will also have the ability to have ID/OD sizes.

### Item Code

* + 1. When the input is selected the list of items will appear and will be progressively filtered as more number are entered. User may select from the list or input the item code.

### Scope

* + 1. The scope input will have the ability to select multiple items and delete them if necessary in a simple way.

### Bearing Type

* + 1. Will be a autocomplete box

### Bearing Process

* + 1. Will be a single select dropdown list

### Identifying Info

* + 1. The identifying information input will have the ability to select multiple items and delete them if necessary in a simple way.

## UI 7 - Add Sizes (Sub screen 2)

Here the user is responsible for entering the measurements for the sizes.

### Shaft

### Clearance

### Bore Size

### Bore Size Horizontal

### Shim Size

### Tolerance

### Seal Size

### OD Size

### Special Notes

## UI 8 - The Big Board

**Goal:** The day’s work is displayed on a monitor that is intended to be used without human intervention. The goal is to show at a glance the current state of the shop’s workload, with a special emphasis on any jobs that require intervention from a manager or that require customer’s approval in order to proceed.

**Overview:** The view is divided into two halves: Jobs on the left and the Parts associated with that Job on the right. Job info displayed includes:

* JD’s Job Number
* Customer Name
* Customer Job Number
* Contact Name + Phone
* Ship date
* Status
* Number of parts
* Number of parts complete

Part info displayed includes:

* Item Code (example: “9187 Turbine Bearing”)
* Work Scope (example: “T/C required, UT”)
* ID Info (example: “.. / Drive End”)
* Ship date
* Status (number of steps complete vs. number of steps total)
* Current step
* Blocking notes, if any
* Check boxes for the following, if applicable:
  + Customer Sizes received and entered
  + UT complete
  + PT complete

## UI 9 – Blocked Jobs

**Overview**: Throughout the workflow, it’s possible for a job to be placed in a “blocked” state where further progress is impossible without manager intervention. Either the manager needs to contact the customer, or the manager needs to review the job. When a job is blocked, it will be removed from the Big Board and placed into the Blocked Jobs list. Here it will stay until a manager clicks the “Clear Block” button. Clearing a block requires a manager sign off. A manager can clear an entire job at once, or a part at a time. If any

Non-blocked parts are shown for reference next to the blocked parts in a selected job.

The UI for Current Jobs will be the same layout as the layout for Blocked Jobs, as described below:

**Coloring:** Jobs and Parts will be color coded according to their state: Jobs/Parts that are In Progress are orange. Jobs/Parts that are Complete are green. Jobs/Parts that are Not Started are gray. Jobs/Parts that are Blocked are red. Hold for Customer Approval jobs are yellow. Quote Only jobs are cyan.

**Scrolling and Paging:** It is anticipated that there will be more jobs and more parts due on a given day than can be displayed on a single screen. This necessitates scrolling or paging; but since there is no human input on this screen, this function must happen automatically. Every 10 seconds the view will cycle such that the next Job’s Parts get displayed. Jobs that have the status of Complete (meaning that each Part in that Job is shipped) do not participate in the cycle.

**Notification:** Each time a job “becomes red” or moves into the Blocked state, an automatic text message will be sent to the phone number (if specified) of every Employee with the skill of Manager. This text will include the JD Job #, Part ID, and a brief description of the blocking reason. Standard 3rd party texting libraries will be used to send the text messages. Twilio, for instance, sends the first 1,000 texts for free and $0.01/text after that.

# General Out-of-Scope Statement

* Maintenance of Functional Data or Enumerated Values where not explicitly stated.
* Any pages or major functionality not explicitly listed in this document (feature creep).
* Any major additions to pages that are defined (feature stuffing).
* Ordering of any list or group of data in any way not specified – if the specification does not specify an order the data will not be ordered.
* Validation or requirement of any fields due to unidentified rules. A rule must be explicitly stated in the specification or marked as required in the database for validation of that field to be in scope. This includes but is not limited to field length, field requirement, field minimum, field maximum, field uniqueness, and field precision.
* Conditional calculation or display of fields not defined explicitly in the design.
* Customization or configuration of items not explicitly stated as customizable or configurable or not explicitly stated as being customizable or configurable in the desired fashion.
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