

Field Force User Stories - Release 1.0

Service Request

Lara = Works In Call Center (stories are desktop-only)

1. Lara wants to log a service call by someone in the community so that a technician can respond.
2. Lara wants the ability to enter all pertinent information and have this information persist so that the technician knows where to go and what vector needs to be treated.
3. Lara wants the ability to edit or delete any Service Requests entered if a mistake is made in entering the information.
4. Lara wants the ability to see when the jobs have been completed so that she can verify that jobs are not forgotten.
5. Lara would like to see previous work done on the site.
6. Lara would like to have site information preserved (such dog, gate codes), so that she does not need to enter them each time the contact calls. She can just verify the information.

Rick = Field Technician

7. Rick is a skunk technician. He may be doing a general inspection and a neighbor comes by and asks to have his property inspected as well. He would like to do the inspection while in the area and have this portrayed as a service request.

Job Management

John = Administrator (stories are desktop-only)

1. John wants to define areas that each technician will handle so that jobs can be done more efficiently.
2. John needs the ability to make changes to these zones if boundaries change.
3. John needs the ability to easily reassign zones in case a technician goes on vacation or gets sick. He will want to assign the zone to someone else.
4. John needs to see which jobs are due to be completed soon and who they are assigned to.
5. John needs the ability to view job assignments and reassign jobs if someone is overloaded, sick, or on vacation.
6. John needs the ability to see the status of jobs that are not getting completed so that he can reassign them, if necessary.
7. John needs the ability to select a group of sources and create a job associated with them.
8. John needs the ability to move incomplete job features from one job to another to ensure that all tasks get completed.

Rick = Field Technician

1. When Rick arrives at work, he wants to select which jobs he will work on for the day so that he can better plan his day.
2. Rick wants the job to be automatically closed after performing a treatment. If it is not automatically closed, he may forget to close it.

3. Rick wants to have the ability to remove closed jobs from his list so that his daily plan does not get cluttered.
4. Rick wants to see jobs that are coming due so that he is not late on any treatments. He wants to see these jobs in the office and out in the field.
5. Rick wants to see activities that he has completed in a set time frame so that he can review what was done. (e.g. last 24 hours).
6. Rick wants to see jobs that are assigned to others so that if needed he can complete their job if necessary.
7. **Related Stories**
 - a. **(Location):** Rick may not be familiar with an area, so he wants to see his features on a map to help disambiguate and locate them. In addition it will help him see which jobs are nearby.
 - b. **(Status):** Rick wants to see his sites on a map and easily see which will be needing treatment soon. He can also see his location in relation to his jobs.
8. Rick may have multiple features that are associated with a single job. He needs to be able to easily select all of them and add them as a job. While on the job, he needs to see which features are associated with the job so that he doesn't forget one.
9. **Duplicate Stories**
 - a. Rick wants to be able to **see previous treatments** and service requests for the property because this may influence how he treats it.
 - b. Rick is working on a site from his Daily Plan. However, next door he sees standing water with mosquitoes breeding. He wants to treat this site as well. If he comes to this site again, he wants to **see the history** of what was done there before.
 - c. Rick will be going to a site later in the day, which is not where he is currently located. He wants the ability to not only **see what treatments were done previously** on this site, but in the general area before he gets there. This may affect how he treats the site.
10. Rick wants to see what the treatment was that caused a follow up to be created because it may influence how he treats it.
11. Rick would like to locate properties by address or by owner name. In addition, he may want to locate a Site by name.
12. When Rick is responding to a follow-up activity, he would like to see the original Service Request information, such as address and contact info. In addition, it would be helpful to know what treatment spawned this follow-up
13. When Rick gets this job, he needs to know what sources are associated with it.

Logging A Treatment (Manual)

Rick = Field Technician

1. Rick wants the ability to log multiple treatments because some jobs require more than 1 type of treatment.
2. Rick may see an issue on a site that is next to his job. Rick wants to log treatments for a vector even though it is not in his job list.

3. As Rick is driving, he wants to be notified as he comes close to a job or site that needs treatment.
4. Rick may have made a mistake in entering his treatments, so he wants the ability to edit his activities or delete them.
5. Rick would like an automated method to calculate the area of a feature being treated. He may not have this information in his notes.
6. As Rick enters his treatment information, he would like to be notified if there is an error or a potential problem with the information that he is entering.
7. Rick may not know how much chemical to add to a feature. Therefore, he would like the app to suggest a chemical amount based on total area being treated.
8. Rick has a set of features that he treats on a regular basis. He may come across a feature that is not part of his regular treatment features. Therefore he wants the ability to treat it and/or add this feature to his list of regularly treated features.
9. Rick has a job that consists of a set of features. He needs to see what features are associated with this job. When a job that consists of multiple features should not be closed until all features are done.
10. When Rick has addressed each feature in a multi-feature job, the job status should change to 'closed'.
11. Rick needs the ability to add photos, recordings and notes to a job site to better show what was done.
12. Some activities that Rick performs require reimbursement from other agencies. Rick needs the ability to designate a job as 'reimbursable'.
13. Rick is out in the field and spots a dead bird. He will bag it and bring it back to the office. He needs a method to log this activity along with all the pertinent information.
14. Rick needs to know that the data he's entered has been saved to the server so that he knows when others will have access to it. He wants to see the sync status while using the application.
15. Rick wants the ability to specify exact dates and times for purposes such as scheduling, or reporting.

Logging A Treatment (Automatic)

Rick = Field Technician

1. Rick works a route on which he performs a repeatable action. He would like these actions to be logged to the route without the need to record each repetition manually.
2. Rick wants to see which routes are assigned to him.
3. Rick wants to know when the route was last worked.
4. Rick wants to know which parts of a route have been completed versus which parts have not.
5. Rick needs to know if there are any parts of a route on which no actions should be performed.
6. When Rick works a route that involves hazardous materials, such as chemicals, he needs to be able to log the total amount of hazardous material that was applied along the route.
7. Rick works a route on which he performs an intermittent action. He wants to see points along the route that show where the action was performed and details about what was done.
8. Rick needs the ability to log different types of intermittent actions.

9. Rick needs the ability to identify locations where intermittent actions have been repeated. He wants to know when an intermittent treatment has become a persistent treatment so that it can be addressed in an appropriate manner.

Analytics / Reporting

John = Administrator (stories are desktop-only)

1. John wants to create reports regarding what was treated and by whom during a specified time frame. (**Work Summary Report**)
2. John needs to report chemical usage to different agencies. Therefore he wants to create reports regarding chemicals used in a particular area in order to report to the city, county or state. (**Chemical Usage Report**)
3. John wants to see what open jobs are assigned to his technicians. He can use this to determine if they are overloaded and need to be reassigned. (**Work Assignment Report**)
4. John wants to create an invoice for reimbursable tasks. (**Expense Report**)
5. John wants to create a report for Waters of the US

Rick = Field Technician

1. Rick wants to see what treatments he performed during the last week so that he can provide a report to his manager. (**Treatment Report**)
2. Rick only works on park sites. He wants to produce a report showing what treatments were made to these sites during the last month. (**Site Report**)

Fleet Management

John = Administrator (stories are desktop-only)

1. John wants to see where his trucks are at any given time so that he can keep track of his fleet.
2. John wants the ability to track a subset of his entire fleet.
3. John wants to see which vehicle is the closest to any service location in order to know who best to call for a specific job.
4. John wants to assign a job to a technician by selecting their vehicle's current location on the map..

Rick = Field Technician

1. When Rick is out in the field, he'd like to see where other trucks are located in case he needs help.

Time Management

Rick = Field Technician

1. Rick needs to record how long he is working on a particular site (Time on Site). These records may be used for reimbursements.
2. If the job that Rick is working gets interrupted, he wants the ability to 'clock in' and 'clock out' of that job in order to provide an accurate accounting of Time on Site.
3. Rick also needs the ability to 'clock in' and 'clock out' to account for times such as lunch breaks.

Laboratory Analysis

Susan= Lab Technician

1. When Susan picks up a trap from a site, she needs the ability to associate it with that location.
2. Susan needs to analyze the data and then tie it to the site where it was collected.
3. Susan needs to be able to prepare the collected samples for testing.
4. Susan needs to view the testing history of each site.
5. Susan needs to create reports using information from a site's test history.
6. Susan wants to automatically sync her agencies data to state reporting agencies (e.g. CalSurv)
7. Susan needs the ability to return to a set of collection sites and know which samples were collected from each location.
8. Susan wants the ability to perform both a one-time site collection and to schedule recurring collections for a single site.
9. Susan wants the ability to create Heat Maps to display locations where significant test results are concentrated. This will help her to identify areas of concern, such as significant mosquito infestation.

Rick = Field Technician

1. Rick needs the ability to access testing results as It may influence how he treats a job site.

Inventory Management

John = Administrator (stories are desktop-only)

1. John needs to keep track of his inventory so that he can reorder supplies when the inventory is running low. He needs to know how much inventory is in primary storage as well as how much inventory has been checked out.
2. John needs to know when inventory is checked out, how much was taken, and who took it.
3. John needs to know, of the inventory that was checked out, how much of it was actually used.
4. John would like to produce monthly inventory reports

Rick = Field Technician

1. When Rick checks out supplies, he needs to record what he checks out and how much he takes.
2. Rick needs to know when he is running low on supplies so that he can re-supply.
3. Rich needs to know the quantity of supplies that he has used by balancing his remaining inventory against his initial inventory.
4. Rick needs the ability to create a report that shows the quantity of supplies that he has used to help account for any discrepancies in inventory totals.
5. Rick would also need the report to show where supplies were used during a particular time span.
6. Rick needs the ability to keep track of his inventory when supplies are exchanged between technicians. (Credits and Debits)
7. Rick needs to view an accounting of the quantity of supplies he has used versus the quantity of supplies that have been debited from his inventory.

8. Rick needs to see locations where supplies were used. He should have the ability to correct any inventory debit or to adjust the inventory balance.