



DEVELOPER BRIEF

SPRINT 3 & 4 – NOV / DEC 2018

GEOSURV

Prepared For:	DEVELOPMENT TEAM
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1 Sprint Details

1.1 Intranet UI Design

The design of the Intranet UI will be undertaken by Wajahat Mehmood. He is part of the team in Slack. Please work together to ensure that this new design is incorporated into the system and that he has everything that he needs to complete.

1.2 Excel to Software

Continuation of the Excel to Software development

1.3 Workflow Max Development

Workflow Max is to be replaced with this system, we need to bring some of the features across to our system

<https://my.workflowmax.com/>

u: adam@humanpixel.com.au

p: \$W*%LctC5O5m

2 Process Map

The process map for the entire business process is available here:

<https://www.dropbox.com/s/7q3cwsni30i7lyv/Geosurv%20Process.html?dl=0>

3 MoSCoW

We will build on Dynamic Systems Development Methodology, using the MoSCoW technique. MoSCoW stands for:

- Must Have
- Should Have
- Could Have
- Won't Have


MoSCoW rules state that all Must Have Deliverables are primary deliverables. Should Have Deliverables are dependent upon Must Have Deliverables. Could Have Deliverables are dependent upon Should Have Deliverables. Won't Have Deliverables will not be worked on in this sprint.

3.1 Must Have Deliverables

3.1.1 Intranet

- New UI to be overlaid onto Intranet
- **Client Information Screen**
 - Client Information needs to be improved.
 - Add task against client
 - Assign task to employee
 - Add notes against client
 - Link Contact to client
 - BCC Email parser?
- **User access levels**
 - See workflow max
- **Task Lists**
 - New section called Task lists where an admin can add lists of tasks. Each task list can be an automatic list of tasks (like a template) which then can be assigned to a project. For instance: Task List AA, AB, AC, AD. And each task list might contain 15 tasks, or 20, or 50 – all added by Admin. In the Job add screen, Admin will select task list which need to be completed. These tasks will then be added to the dashboard of the employee assigned to that project, as a checklist.

3.1.2 Schedule

- New UI to be overlaid onto Schedule
- Ability to Drag and Drop Jobs
- When Dragging a job, the system should ask Copy or Move. If copy, then new job number created
- Job Number remains persistent against a Project (does not change unless changed by Admin). Therefore, if a project is copied, that project must retain the Job Number
- Dash Number to be able to be added next to Job number, optional 
- User should be able to modify Job number
- Edit icon to display on job allowing edit of job
- Ability to Colour code a project on schedule
- Ability to lock the schedule for that day
- Ability to add a row in schedule so one employee might have 4 jobs for the day, or 5, or 6
- Add Task number under Job Number – Task Number should be Job Number plus two letters on the end, so if the job number is 201811001, then if task list AC was selected, the task number will be 201811001-AC, and if the project has a dash number, it might be 201811001-1-AC
- Change time on left hand side of schedule to Task 1, Task 2, Task 3 instead of 700, 1100, 1400
- Add accordion to all rows allowing collapse of internal Employee rows
- Unassigned Bookings notification at top of schedule allowing drag and drop of new bookings into schedule

Unassigned Bookings

Project Name
Job Number

Previous Date Next Date

	Thu 2018-11-29	Fri 2018-11-30	Sat 2018-12-01	Sun 2018-12-02	Mon 2018-12-03
Commercial					
Empfest Empfest Lanme	700 this is the test booking Add	Add	Add	Add	Add
	1100 Add	Add	Add	Add	Add

- Auto suggest – Ajax quick search suggest – “Please enter 3 letters or numbers to search” – System should automatically suggest Job Number, Company or Project to select allowing quick add of new customers into the schedule.
- Remove the dropdown for Client and Project, as Geosurv has 1,000's of clients and 10,000's of projects, so we need a search field for both.
- “Subby Pack” to be generated and available on the dashboard of the user. This should mirror how the system works in Workflow Max (effectively a merge document) – See under “print job brief” in Workflow Max.

3.1.3 Dashboard

- Task List to complete per project
 - Completed tasks added in project history, with date stamp and employee name (Audit trail) – Cannot be deleted.
 - Ability to add comments to each task and upload photos

3.1.4 User Screen

- Home address
- Construction card (qualifications) <- this needs to open in a lightbox, not the same browser window
- Excluded Projects section – This is an admin only VIEW and EDIT field. Admin can select Client's and Projects which are not to be assigned to this employee. A project can then not be added to that employee in the Schedule

3.1.5 Bookings Screen

- New section on left hand side
- List of unassigned bookings
- Quick Add button on left hand menu and on dashboard
- Dialog box opens and allows a quick add of a booking
- Auto suggest – Ajax quick search suggest – “Please enter 3 letters or numbers to search” – System should automatically suggest Job Number, Company or Project to select allowing quick add of new bookings. This is needed, as there may be a lot of phone calls coming in at once, and bookings need to be stored somewhere before they can be added into the schedule.

3.2 Should Have Deliverables

3.2.1 Intranet

- On **Add new Project Screen**
 - Add new client button if client doesn't exist
- **Client Information Screen**
 - Sync Invoices from Xero and display in client card based on email address

3.2.2 Schedule

- Sync employee leave to display availability to add to project
- Job Schedule and Add employee to Project should be added. See Workflow Max

3.2.3 Timesheet Entries

- Integrate Xero API into system
- Send timesheets to Xero for Admin approval
- Copy timesheet layout from Workflow Max
- Copy weekly summary from workflow max
- Add notes to timesheet

3.2.4 User Screen

- This information should pop up on Schedule page

3.3 Could Have Deliverables

3.3.1 Intranet

- On **Add new Project Screen**
 - Add budget for new Projects
- **Project Task list**
 - Some Projects will have generic tasks, other jobs will have full list of tasks
 - Tasks are managed through a task list which then can be imported to projects
- **Projects**
 - Variation button allowing variations to be added to tasks
 - Add Project Tasks
- **Quoting**
 - Ability to add Quotes into the system and link quotes to budget

3.3.2 Dashboard

- Reports displayed on dashboard
- Should be able to see multiple reports and download PDF
- Project Calendar showing projects for individual employee

3.3.3 New Pages

- HR Policies Page
- Procedures Page
- User Forum
 - Discussion with comment ability

4 Timeline

All deliverables at 3.1 should be delivered AND tested before **9am on 21st December** Australian Business Hours. Any other deliverables in 3.2 or 3.3 should be delivered after all deliverables in 3.1 are delivered and tested with all bugs squashed. DO NOT DELIVER anything not in 3.2 or 3.3 before 3.1.