**Box Program Dashboard Scoping Document**

**Purpose**

This document outlines the development and integration of the Box Program Dashboard within the PlanITVision Portal. The enhancements aim to optimize workflows for laptop returns and redeployments, including robust validations, tracking capabilities, and system prompts. These updates streamline operations across departments, ensuring full visibility into logistics, inventory, and financial details.

**Key Stakeholders**

**Project Sponsor:** Manohar Bandarum, IS Director  
**Scrum Master/Project Lead:** Bijay Karki, Lead Developer  
**Scrum Team:** Andres Toro, IS Coordinator

**Product Owners:**

* Grant Hardy, Director of Product Operations
* Paul Guenther, Sr. Manager, Transformation & Operational Excellence

**Definitions**

* **Box Program Dashboard:** A system for monitoring laptop returns, refurbishments, and redeployments.
* **Job ID:** A unique identifier assigned to each job.
* **Plan ID:** A unique identifier for units within the system.
* **Logistics Aging:** Time elapsed during the logistics phase.
* **Production Aging:** Time spent in refurbishment.
* **Outbound Tracking:** Tracking number for outbound shipments.
* **Inbound Tracking:** Tracking number for returned laptops.
* **Financial Oversight:** Tracking of costs, invoicing, and payments.
* **Total No. Of Units:** The total number of units associated with a job.
* **ExEmployee Aging:** The time elapsed since the ex-employee received the return request.
* **Courier Status:** The current shipment status provided by the courier.

**Project Overview**

**Problem Statement**

The current process for handling ex-employee laptop returns and redeployments is fragmented, lacking a centralized tracking system. This leads to inefficiencies in job validation, logistics tracking, and financial oversight.

**Project Objectives**

* Automate tracking of devices through their entire lifecycle.
* Enhance transparency in shipment status and refurbishment progress.
* Provide financial tracking for invoicing and payments.
* Enable dynamic filtering for efficient data retrieval.

**Project Scope**

**Enhancements**

**Job Tracking Module:**

* Logs jobs via API and monitors status changes.
* Displays timestamps, carrier updates, and milestone completions.

**Shipping & Tracking Module:**

* Integrates with couriers (e.g., UPS) for real-time shipment tracking.
* Manages box/label assignments and delivery confirmations.

**Notifications Management Module:**

* Automates email reminders to ex-employees.
* Logs reminders sent and response status.

**Inventory & Production Monitoring Module:**

* Tracks refurbishment progress and available inventory.
* Reflects the latest production status updates.

**Financial Oversight Module:**

* Captures logistics expenses, invoicing amounts, and settlement timelines.
* Provides transparency over cost allocation.

**Dashboard Structure**

1. **Jobs to Review** – Ensures jobs are correctly logged before processing.
2. **Jobs Outbound in Transit** – Manages shipping label creation and shipment tracking.
3. **Jobs Pending Receiving** – Monitors inbound shipments and unit check-ins.
4. **Active Jobs** – Tracks refurbishment progress and unit readiness.
5. **Jobs Ready to Settle** – Handles invoicing, payments, and reconciliation.

**Sample Data Tables and Pie Charts**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Jobs to Review** | |  |  |  |  |  |  |  |  |  |
| **Job ID** | **Client** | **Job Status** | **Created Date** | **Employee Name** | **Requestor Name** | **Job Address Country** | **Assigned To** | **Logistics Aging** | **Total No. Of Units** |  |
| J19488 | True Blue | Created | 2/1/2024 | Bob | Luis | 555 Wilson Dr. Hartford, CT 33155 | Nicolas Vasquez | 5 days | 1 |  |
| J19489 | True Blue | Validated | 1/28/2024 | Ana | Elvis | 123 Maple Street Toronto, ON Canada M5G 1X6 | Nicolas Vasquez | 5 days | 2 |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Jobs Outbound in Transit** | | |  |  |  |  |  |  |  |  |
| **Job ID** | **Job Status** | **Box/Label Sent Date** | **Expected Warehouse Arrival** | **Logistics Aging** | **Job Address Country** | **Assigned To** | **Box Sent?** | **Courier Status** | **Total No. Of Units** |  |
| J19488 | Label Generation In Progress | 2/5/2024 | 2/10/2024 | 5 days | Canada | Jorge Chang | No | N/A | 1 |  |
| J19489 | Picking Box | 2/1/2024 | 2/6/2024 | 5 days | USA | Michael Hartney | No | N/A | 2 |  |
| J19490 | Box/Label Shipped | 2/1/2024 | 2/6/2024 | 5 days | USA | Mark Fawcet | Yes | In Transit | 1 |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Jobs Pending Receiving** | |  |  |  |  |  |  |  |  |  |
| **Job ID** | **Job Status** | **Expected Warehouse Arrival** | **Courier Status** | **ExEmployee Aging** | **Date of last Reminder** | **No. Of Reminders Sent** | **Total No. Of Units** |  |  |  |
| J19488 | Box Sent | 2/10/2024 | N/A | N/A | 2/10/2024 | 1 | 1 |  |  |  |
| J19488 | Box Sent | 2/10/2024 | N/A | N/A | 2/10/2024 | 2 | 2 |  |  |  |
| J19489 | Box Sent | 2/6/2024 | In Transit | 1 day | 2/6/2024 | 5 | 1 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Active Jobs** |  |  |  |  |  |  |  |  |  |  |
| **Order No.** | **Type** | **Job ID** | **Job Status** | **Expected Warehouse Arrival** | **Actual Warehouse Arrival** | **Received in the System** | **Moved to FG Date** | **Aging from Date Received** | **Aging from Audit in Progress Date** | **Total No. Of Units** |
| 1918798 | API | J19488 | Sort in Progress | 2/10/2024 | Pending | Pending | Pending | 5 days | N/A | 1 |
| 1918799 | Manual | J19488 | Audit In Progress | 2/10/2024 | Pending | Pending | Pending | 5 days | N/A | 2 |
| 1918800 | Manual | J19489 | Audit Completed | 2/6/2024 | 2/7/2024 | 2/7/2024 | Pending | 5 days | 1 day | 1 |
|  |  |  |  |  |  |  |  |  |  |  |
| **Jobs Ready to Settle** | |  |  |  |  |  |  |  |  |  |
| **Job ID** | **Job Status** | **Amount Paid** | **Amount Due** | **Phase 1 Invoice Date** | **Phase 2 Invoice Date** | **Final Invoice Date** | **Aging from Due Date** | **Total No. Of Units** |  |  |
| J19488 | No Box Received | $100.00 | $200.00 | 2/15/2024 | 2/18/2024 | 3/1/2024 | 5 days | 1 |  |  |
| J19489 | Final Record | $50.00 | $150.00 | 2/10/2024 | Pending | Pending | 5 days | 2 |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Pop Up window when user clicks on the Total No. Of Units Values** | | | | | |  |  |  |  |  |
| **Job ID** | **Model** | **Serial Number** | **Recipient name** |  |  |  |  |  |  |  |
| J19488 | ThinkPad X1 | SN12345 | Ana |  |  |  |  |  |  |  |
| J19488 | ThinkPad T14 | SN67890 | Bob |  |  |  |  |  |  |  |

**Meeting Recordings**

1. **Date:** 2-21-2025 | **Attendees:** Bijay Karki, and Andres Toro   
   [Resumen: Box Program Project TimelineFriday, February 21](https://teams.microsoft.com/l/meetingrecap?driveId=b%21kT0FSSvVAEm3Zq5jG5FBr3Tkq66_pUZNguMkCVphPM2BpWDV6sgQSZtLQNMn3H_L&driveItemId=01TRXHJXAWXLHDLIZQSFE27YRB5L6DBGJI&sitePath=https%3A%2F%2Fplanitroi-my.sharepoint.com%2F%3Av%3A%2Fp%2Fmtoro%2FERa6zjWjMJFJr-Ih6vwwmSgBNEeFZSUQ4Ugv6sLuinDS3A&fileUrl=https%3A%2F%2Fplanitroi-my.sharepoint.com%2Fpersonal%2Fmtoro_planitroi_com%2FDocuments%2FRecordings%2FBox%2520Program%2520Project%2520Timeline-20250221_163214-Meeting%2520Recording.mp4%3Fweb%3D1&iCalUid=040000008200E00074C5B7101A82E00800000000201DD9817A83DB01000000000000000010000000A8FC3F703FA8E148A22064632D10C5F7&threadId=19%3Ameeting_NGIzMWZkNjItNjc4OS00NDk2LTkyOWYtMDJhMzdhNmY1ZmEx%40thread.v2&organizerId=f6cd8e12-f992-47db-9427-c3b1965d7ee4&tenantId=3544e0e4-b018-4e7b-9d10-7e87f2837bb6&callId=9f57c8f6-e5c4-42b7-841c-4e73bc8758d6&threadType=Meeting&meetingType=Scheduled&subType=RecapSharingLink_RecapCore)

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| Document Revision History | | | |
| Rev. | Description of Change | Date | By |
| A | Creation of Document | 2/20/2025 | Andres Toro |
| B | Updated details of tables after speaking with Bijay | 2/25/2025 | Andres Toro |
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