PianoTrackr
Instrument Management System

Introductory Documentation

Overview

PianoTrackr is designed to assist you in keeping track of the the instruments you care for and the work that is done on them. In its current early state, it includes functionality for maintaining information about a piano, allowing customers to request work to be done, allowing technicians to log the work that they do, and allowing for reports on work done. This documents provides an overview of current usage and possible future enhancements.

Access

In order to allow for easy testing and demoing, the current version of the application is installed and available at http://128.84.154.60/pianotrackr/. An administrative account for Don McKechnie has been set up: the login is 'don' (without quotes), and the password is 'pianos' (again without the quotes). Passwords and logins are case sensitive.

Usage

Dashboard, Logging in
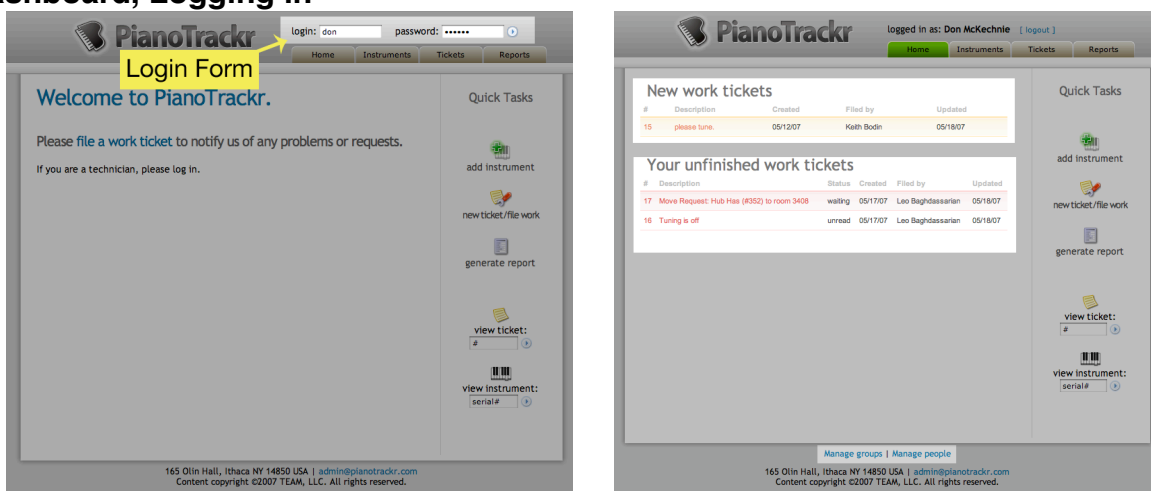
When you first go to the application, you will be presented with a screen that asks you to login or, if you are a customer, file a work ticket. This is the screen on the left above. Once you have logged in, you will be presented with the screen to the right above. This screen lists all the work tickets which are currently unread and unassigned to technicians at the top under "New work tickets". Below this, tickets which are currently assigned to you but have not been completed yet are listed under "Your unfinished work tickets". At the very bottom of the screen, there are two links where are only viewable to users in the Administrators group: "Manage groups" and "Manage people".

People & Groups

In PianoTrackr, people fall into three basic categories: administrators, technicians, and customers. Which category a person is in depends on the group they belong to and whether or not they have a login for the system. Customers do not have logins: they are only allowed to access the screen for requesting work to be done, where they can pro-

vide their contact information so that a technician can get in touch with them if necessary. Technicians have logins to the system, and can work with instruments, record information on them, and generate reports. Administrators also have logins to the system, but must also be in the "Administrators" group. Administrators can do everything technicians can do, and can also manage people and groups.

Groups can be edited, deleted and created by clicking the "Manage groups" link. Certain groups cannot be edited or deleted because they are built-in groups used by the system, such as the "Administrators" group.

Users can be edited, deleted, and created by clicking the "Manage people" link. Administrators can change any person's password while editing that person.

Instruments

From the instruments tab, technicians and administrators can edit and lookup information about instruments. The initial page under this tab lists all known instruments and provides links for creating new instruments. A find-as-you-type filtering widget at the top of the page allows to user to rapidly filter the list of instruments for the one they are looking for.

Clicking on an instrument in the list shows details of that instrument, including the values assigned to it for the workload formula. More importantly, two sections below the piano's details list all work tickets assigned to this piano that have not been completed, as well as all past work that has been done on this piano.

Work Tickets

Work tickets are used to track both work requests and work that is done on a piano. A work ticket can be created by any person, including customers who do not have logins to the system, but customers can only edit certain attributes of a ticket. Only technicians

and administrators can decide when a work ticket should be marked as "done" or decide who a work ticket should be assigned to.

The screenshot above on the left is an example of what a technician creating a work ticket will see. They can set a ticket as done, set the amount of time used taken to do the work and describe the type of work done – whether it be a tuning, a voicing, etc. When customers create work tickets, they are presented with the ability to create a customer account (which is tied to their email address, and does not give them access to any part of the system except the ability to create a work ticket) or authenticate themselves using a previously-created customer account. For the work ticket itself, they can only write a description of the work request and set a piano for which the request is relevant. They cannot set the status of the work ticket or who is should be assigned to: all work tickets are be default unassigned and unread, so new customer-created tickets will appear under the "New tickets" when a technician logs in, making it easy for them to know when new work requests come in.

Clicking on the the "Tickets" tab at the top of the screen will present the user with a list of work tickets – the user can select which statuses they wish to view, and can also filter the displayed list with a find-as-you-type widget. Clicking a ticket within the list allows a technician to edit it.

Reports
There are three reports currently available – weekly, annual, and custom. All three reports can be accessed by clicking the "Reports" tab at the top of the screen. All three reports can be constructed for an individual technician or for all technicians at once. There is a "generate report" button in the sidebar which will take the user directly to the weekly report. The weekly and annual reports are based on the reports seen in the FileMaker databases.
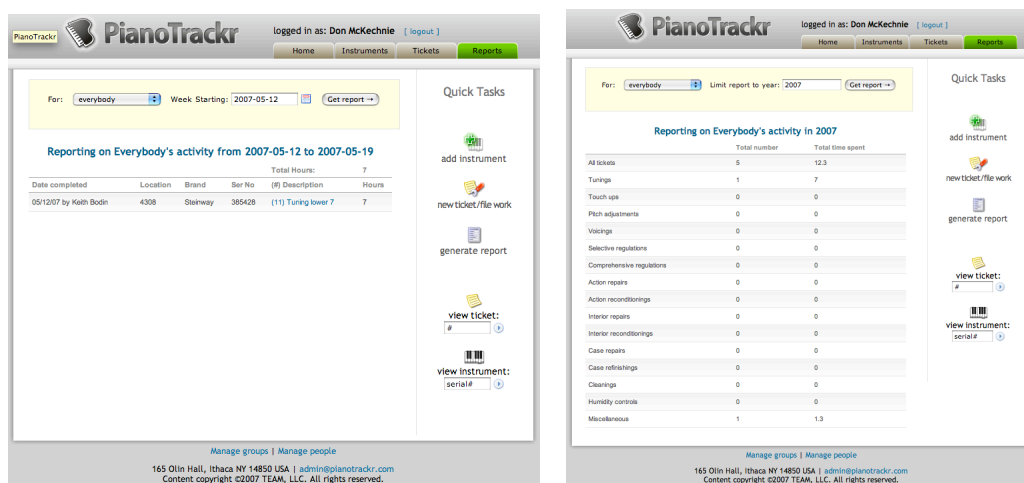
The weekly report is shown to the left above, and the annual report is shown to the right. Currently, the annual report bases itself on the calendar year, *not* the fiscal year, which was a mistake on our team's part. This should probably be changed in the future. Even so, this should not limit the user's ability to create reports for the fiscal year. The custom report allows the user to pick a custom date range to report on the style of report to generate – detailed, like the weekly report, or summary, like the annual report.

Future
In it's current state, PianoTrackr is usable and has sufficient features to be a valuable tool. There are, of course, even more features that would be useful to you. This is a short list of possible future enhancements.

• Data migration from previous systems (e.g. FileMaker databases) could be made available.

• An accounting and budgeting module

• A module for tracking items on loan and item inventory.

• The ability to track the different components of a piano, such as the action and the strings, separately.

- Improvements to how technicians record work done, allowing them to easily visually specify which part of a piano (even down to specific keys) they worked on, and to re-trieve this information at a later date.

- Since customers must provide email addresses to submit work request tickets, we feel it would be useful to allow customers to actually submit tickets via email, allowing them to simply send an email to the application to create a work ticket, rather than need to go the application itself in a web browser.