



Staff Meeting: July 10, 2008 10:45 AM – 3:30 PM

Location: Kennewick Office

Attendees: Don Warf, Alan Brower, Doug Clough, Jenn Nighbor, Carter Stein & Jamie Swan

Recorded by: Jenn Nighbor

Agenda Item: TDS (Tag Distribution System)

- 1. Status Overview**
- 2. Walkthrough Application**
- 3. Topic Discussion**

TDS – Tag Distribution System

More detail regarding this system may be found on the wiki.

- 14 pages on Status update and 25 pages on TDS walkthrough

TDS Purpose

- Track movement of tags from manufacturer, through PTAGIS Inventory, to Projects.
- Streamlines process for getting tags ordered and shipped.
- Provides extra information to USERS of PTAGIS interrogation data.

Three Different USER types

- BASIC = Project POCs (Points of Contact)
- APPROVAL = Jamie S. at BPA
- INVENTORY = Jenn Nighbor at PSMFC

PPO Tables

Contains information regarding “Persons, Projects & Organizations”

Status: Work COMPLETED

- Most recent features of web-application.
- Database tables, rules, procedures.
- Main “backbone” of tag-data loader

Status: Work REMAINING

- Implement missing features, for example:
 - i. Capture UPS tracking code & shipping cost.
 - ii. Enforce lead time on “not after date”.
 - iii. User guide, tool tips, on-screen help.
 - iv. Date sensitivity to make data entry fields read only when they become history.
 - v. Shipment-state interlocks; prevent user from editing contact details, quantities, etc. when shipment has been packaged.

Jamie Swan, BPA, suggested connecting a work order number to each project as well as a project comment box, sortable by author.

Jenn to create draft email for shipment completed. Use brackets [] for automated information.

Scheduling Timeline:

August 21	Meet back in Kennewick <ol style="list-style-type: none">1. Have a final best guess list of POCs for tag request email.2. AM: Test Scenario & PM: POC list and review
September 1	Email POCs initiating tag requests.
September 10	Drop dead ship date for FY08 tag shipments.
September 15	Inventory final counts. Jamie to come to Kennewick to conduct final PIT Tag count and close out books with Jenn.
September 18	Email reminder to those POCs who have not responded with their tag requests.
October 1	Final reminder, then Jamie makes some phone calls to finalize tag requests.

Carter Stein took the following notes during the TDS Meeting.

Tag Distribution System (TDS) Development and Implementation Planning for 2009

Agenda

- Status
- TDS Application Walkthrough
- 2009 Tag Distribution Schedule

Status & System Overview

See the following two Documents [\[1\]](#) TFW July 2008 Status] [\[2\]](#) TFW Web App Status]

- System Components
 - Web Interface
 - Tag Movement From Destron > PTAGIS Receiving > Inventory Processes > Shipping to Projects
 - Data Management (Production Front-end & Back-end / Development infrastructure)
 - TPA schema
 - PPO schema
 - PTAGIS "Core" Schema
- Work Completed
 - Most web-app features
 - Database Tables, Rules & Procedures
 - **Backbone** of tag-data loader
- Work Remaining
 - Capture tracking code and shipping cost
 - Enforce least time on **not after date**
 - User Guide, too tips, on-screen help
 - Date sensitivity to make data-entry fields read-only when they become history
 - Shipment-state interlocks (prevent user from editing contact details, quantities, etc. when shipment has been packaged)
 - Alerts (need to define what kinds of alerts need to be generated to Approver, Inventory or Basic roles)
 - Notify users that a request is needed by the system
 - Notify users that distribution information is needed
 - Other Anomalies not yet identified
 - See use cases: E.g., User cannot take tags due to, say, flooding... ..need a report...

TDS Application Walk-through

Initiate application on development machine at <http://pitblade.psmfc.org:7001/tpw>

Reviewed application work-flow for *Approver*, *Basic*, and *Inventory* user roles.

- - Questions / Issues
- Mechanism for adding and changing (new) user names / addresses
- How to restrict dates (ship not before / after) (See work in progress)
- Want to be able to over-ride shipment rules (e.g., User calls at last minute and wants tags delivered today which would violate the rule that we require at least two weeks notice prior to shipment -- Inventory user could override rules and would allow shipment).
- Need mechanism to re-assign people to projects. Would people need to see information about the former project association?
- What happens if DF sends incorrect data?
- Are people able to update their address and/or organization information?
- Would like to be able to associate a *work order* number with a project?
- Would like to be able to associate a note with a project's distribution request information.
- Want to be able to *morph* multiple projects into a single project.
- Want to be able to *split* single project into same projects with *children* (e.g., 198712700-1, 198712700-2...)
- Want to present a pop-up alert that a box is not found when receiving inventory shipment.
- Want to be able to present expanded list of vials contained in a box (click the **down-arrow**) when receiving tags. Each vial in the expanded list will have a check-box to be used to indicate the presence of the vial in the box.
- Jamie will write stipulation in PO to require for DF to e-mail tag shipment information to PTAGIS in *TPA* format.
- TDS will contain some summaries on Approver and Distribute tabs.
- Break shipping costs into 1) shipping; 2) insurance & 3) fuel surcharge.
- Don, Jenn and Jamie will mock-up report prototypes.
- Doug will provide simple inventory/shipment summaries on the grid-cell TDS application as shown during walk-through.

Alert Ideas

- Email to POC when project tag request is approved.
- Email to POC when approval amount changes with copy to Approver.
- Email to Approver when Tags Received into inventory (Need to decide whether a different email message is sent when *all* shipments for the order has been received).
- Email to Tag recipient (copy to inventory) when tags shipped from PTAGIS. (Jenn will draft the prototype email).
- Email to POC when tag request needs to be filled out (how would this be triggered?)

2009 Tag Distribution Schedule

We anticipate deployment of the new Tag Distribution System for 2009 Tag Request, Approval and Distribution processes. TFW data and 2008 tag receipt and distribution information can be available for the initial deployment of TDS. Legacy data from TDI will be percolated into TDS subsequent to completion of TDS. Carter and Doug will prioritize the backlog queue and attempt to find time to put together a simple PPO manager that provides a user interface to change name, address, project and roll information.

- Aug. 1, 2008 -- Doug to compile POC email / address listing for review by Jenn and Jamie.
- Aug. 21, 2008 -- TDS test walk-through and 2009 Tag Request kick-off meeting.
- Sep. 1, 2008 -- Send Tag Request invitation to Project Points of Contact.
- Sep. 1, 2008 -- Last day for POC's to request tag shipments.
- Sep. 15, 2008 -- Stop tag shipments prior to physical inventory.
- Sep. 18, 2008 -- Send reminder to POC's that have not responded.
- Sep. 22, 2008 -- BPA Physical Inventory.
- Oct. 1, 2008 -- Send final notice to POC's that have not responded.
- Target Nov. to incorporate TDI information into TPA schema.

Meeting adjourned at 3:30 PM.