

Task	Type	CH2M Approach, if determined	Comments	Estimated LOE	2017 Priority	Approval Date	Target Date	Comments	Status
Add the Grease Haulers to the record lookups and <u>admin reporting</u>	Enhancement		Needs to be added like FSE since changed functionality to match FSE	8	1		10/21/2016	Needed on admin side only. Not necessary on the public side - see request for a public certified hauler list below	Complete
Admins print certificates from lookup results	Enhancement	Should be able to reuse the code and logic built for the users to add a column to the search results on the admin pages to print certificates as well	Add ability to reprint certifications for administrators when they look up a user	4	1		10/21/2016		Complete
Have all lookups that filter the records where it filters for the string anywhere in the filter	Enhancement	Fix query to use LIKE statement instead of =	Use FSE first name as example for how to implement	2	1		10/21/2016	Code uses 'Contains' which allows them to search any letter in the name - the more they type, the more it narrows down the choices	Complete
On the location where you can "Add" employer to profile, bold the text about employer not being found so more visible and/or move it to a more visible location	Maintenance		Might be placed in current location due to styling of page – could be problematic to move if page rendering dynamically	1	1		10/21/2016	See new related task below for public hauler report	Complete
Add hashed passwords functionality to HRFOG	Enhancement	Use the same functionality that currently exists in SSORS and apply to PARS		6	2	11/17/2016	1/6/2017		Complete
Archive expired users with emails only.	Enhancement	Recommend marking as In-active and not removing from database. LOE will be determined after figure out approach.	Only completely removing them from the database and server will reduce storage space required. So we'd have to come up with an archive process and then do the archive periodically and complete remove from database/server. Right now, the size of our database is only 7.34 MB so I am not super worried about it. For performance, if we just add the ability to mark the users as In-Active, that will help with the full user list. I can also add an option to Full User to show 'All' or 'Only Active' as well. SMH Update 8/22/16: Would like to add option to mark users as 'Inactive' for the administrators and then filter out inactive folks from admin reports, which will reduce time to run report ARS Update 7/31/17: Added new ActiveUser field to Users table. 11/3/2017: added checkbox to form to show status RJE 3/7/18: The purpose of the inactive users was to exclude them from reports so that they run faster (and won't time out). With that being said, we do want to exclude them from reports BUT we need a process for handling inactive users. Based on my testing an inactive user can still log in and get certified. We either need to disable the user's access to their account and direct them to contact the system admin to unlock their account or have an automatic switch that makes an inactive user active again once they pass a test	4	2	11/17/2016	1/6/2017	If database size is not an issue, keep as is. Purging can than be done manually through PDC/CH2M on an annual basis. See new related task below for reporting option If mark as Inactive, should this affect ability to login or inclusion/counts for reporting? See email from 11/3/2017 RJE 4/24/18: The Committee has asked that we take NO ACTION on the "archived users" functionality. They will revisit using the functionality in the future if needed.	Complete
Add expiration and exam type to notification emails.	Enhancement	Right now just generic because of how the data is pulled.	"ExpiredCertMailer" project see p.20 RJE 3/7/18: Verified that this is complete	8	2	11/17/2016	1/6/2017	code shows this already exists	Complete
Add a filter by user ID for all record lookups – FSE, Hauler, FSE business	Enhancement	Use same logic as other filters, just apply to ID		4	2	11/17/2016	1/6/2017		Complete
Add a text box to force users to re-enter their email when registering for site	Enhancement		Provides a form of validation that they entered the email correctly – help reduce mistakes	3	2	11/17/2016	1/6/2017		Complete
Provide an export in administrative site for user names that don't look like valid emails. Reduce SPAM.	Enhancement	Could use missing "@" or "." To check for these – may not catch all errors.	ARS Update 7/31/17 - Add to QCs in data dump.	2	2	11/17/2016		sent db to HRPDC on 9/21/2017 RJE 3/7/18: Waiting on Committee member feedback RJE 4/24/18: Let's close out this task and combine with the QC line	COMPLETE
Allow users to add business listing during profile creation	Enhancement	Will open up adding businesses whether user is certified or not. Will have options available on both profile and certified pages at first then allow committee to decide where to keep it.	Currently only available after passing a test. Will assigning before impact any reports, searches, etc.?	6	2	11/17/2016	1/6/2017	We fixed this during Priority 1 fixes. Can now add any business they want with just a profile and no tests. Just have ladies test this with a new fake user.	In Progress

Attachment 4

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Provide locality accounts with access to the "ALL" option under FSE and FSE Worker List report which will run faster and return only certified users		Will provide all the same options PDC has for these reports.	ARS Update 7/31/17 - Add "ALL" option only to current list which is locality that is logged in.	4	2	11/17/2016			Complete
Move change password button lower on page	Enhancement	Will move and make smaller.	Can be confusing for users to see this immediately upon logging in. Also, doesn't need to be so prominent ARS Update 7/31/17 - added new section lower on page with smaller button.	1	2	11/17/2016			Complete
Change the Available Certifications functionality to be icons along with text and use images on icons that communicate test clearly	Enhancement		PDC provided icon samples ARS Update 7/31/17 - FSE Worker = House with knife and fork Grease Hauler = Truck	4	2	11/17/2016			Complete
Remove 'Employments' table from database and application if not in use.	Maintenance			2	3	11/17/2016			Complete
Remove old user 'Company' fields from database and application	Maintenance		These used to be used by grease haulers but no longer needed since implemented new grease hauler company functionality. ARS Update 7/31/17 - only see 'Company Name' field in Users and Grease Haulers tables. Need clarification	2	3	11/17/2016			Complete
Look into issue with Roles when new user added	Maintenance	Noticed in 2017 deploy that when user is added, sets role at 0 when it should default to 4. Need to research and understand roles, how they are used, and fix this issue	RJE 3/7/18: I would recommend moving the role issue to a new, separate task since it doesn't relate to the purge function RJE 4/24/18: Moved Role issue to its own line Found code where should be setting user role to 4 for both user registrations or manual registration			4/24/2018		Added default user role = 4 on 8/30/17	Complete
FSE edit list issue; Remove VDH Import functionality	Maintenance	issue found by Rebekah	Admin site can't edit all FSE records, only ones entered manually; 8825 records in table as of 10/31/2016 - 7724 from VDH import; 1101 manually entered RJE 3/7/18: Admins need to be able to purge a record from the system too. Right now we can only edit.	8	2	11/17/2016	1/6/2017	NOTE: - PURGE button is only available if there are no related employee records in the list at the bottom. - The list at the bottom shows ALL employees associated with the record, regardless of whether they have a current certification. - The count on the Hauler List table is CURRENT certifications only.	Complete
New Certified Hauler Report and New FSE Report	Enhancement	For both haulers and FSE will add the option to see the count of certified employees in the search results and also add an option to download the current search results showing in grid.	Localities would like to have a report for the public to view that shows certified hauler companies. Best solution may be an Admin report of the hauler table that HRPDC staff can QC for edits and then have CH2M post on site as PDF. There are probably too many errors in the tables to have this process automated.	8	2	11/17/2016		ARS Update 7/31/17 - Decided to simply add Count on main Food Service Establishments and Grease Hauler Companies pages next to each company name	Complete
Force user to search for a FSE before displaying option to manually add a business listing		Will track whether user attempts a search. If so, will allow them to add. Not entirely sure of workflow within code so conservative on LOE	Can the option to add a new business (FSE in particular) appear only after an initial search is completed by the user? That way users are forced to look for an existing FSE listing before they can add something new to the database	10	4	11/17/2016		ARS Update 12/2018: Hid the "click here to add" link until after a search comes up empty. (Add New FSE and Add New Hauler on Manage Profile page)	In Progress
Combine 'Profile' and 'Get Certified' pages	Enhancement		This is to simplify and streamline the user experience and certification tracking. ARS Update 7/31/17 - Added sections to Manage Profile page (current and available certifications). Steps should be 1. Register, 2. Pick Employer, 3. Go to Profile Page, 4. Take tests. Removed Register from top, remove Learn, Get Certified, Record Lookup links on menubar.	8	2	42691		Current fix - moved Your Current Employment tables near top of Manage Profile Page and Certifications tables to bottom so after user registers, it takes them to the Manage Profile page where they can add employment and add certifications. Another idea - hide certification tests until they have an associated employment record?	Complete
Email notifications - document logic and verify working	Maintenance		ARS Update 7/31/17 - Check that users are not getting duplicate emails for failed tests too. See Katie's email from 7/10/17.	2	3	11/17/2016		Is this still a problem?	In Progress

Task	Type	CH2M Approach, if determined	Comments	Estimated LOE	2017 Priority	Approval Date	Target Date	Comments	Status
Provide a data dump of all data to HRPDC administration in access database with relationships (queries) so they can review data and determine what QCs they would like to implement	Maintenance	Include select distinct of grease haulers listed in user accounts since grease hauler table not currently utilized; One QC would be for issues like duplicate emails or invalid emails	ARS Update 7/31/17 - Some QCs will include: Possible SPAM email - not sure how to define query (ROLE = 0) qry_Users_Role_0 Invalid email address (missing @ or period or blank) = (with expired test dates) qry_Users_EmailAddress_Invalid_Expired Duplicate Users by first/last name = qry_Users_Name_Duplicates Duplicate users by email address = qry_Users_EmailAddress_Duplicates Duplicate Businesses - help to standardize list (by duplicate address & city) = qry_FoodEstablishments_NameAddress_Duplicates_Count (duplicate records for same name/address combo), qry_FoodEstablishments_Address_Duplicates_b_ByName (different business names at same address) Inactive Users (old accounts -- defined as no current certifications for the past 3 years) = qry_Users_ExamResults_None, qry_Users_ExamResults_c_Expired FSE missing Name or Address or contains leading spaces = qry_FoodEstablishments_NameAddress_None FSE with related Users = qry_FoodEstablishments_Users_Count Users without business associations - 2 reports (FSE & hauler) = qry_Users_FoodEstablishments_None, qry_Users_GreaseHaulers_None Invalid users - blank name fields or contains leading spaces = qry_Users_FirstNameLastName_None	4	2	11/17/2016	1/6/2017	sent db to HRPDC on 9/21/2017 RJE 3/7/18: Waiting on Committee member feedback RJE 4/24/18: Committee requested QCs provided in comments to left. Before building in website, please send report results for review so we can evaluate if any additional fields need to be added. ARS 12/4/2018: see NewReportsListing.xls for QC status	Complete
Create QCs, decided by HRPDC in Priority 2 task, on website in Excel Reports section	Enhancement	Just create the QCs and add to options for current Excel reports for administrators	HRPDC will decide what QC to create and implement ARS Update 7/31/17 - TBD after HRPDC reviews data dump QCs	8	3	11/17/2016		ARS 12/4/2018: see NewReportsListing.xls for QC status	Complete
Fix 'Purge User' button to purge from main user table and all related tables so don't have orphaned records	Enhancement	When a user is purged, it only removes info from User table, need to remove from all related tables as well. Database savvy user has asked that we also make sure UserIDs don't get reused. I am pretty sure they won't because it's an auto-number but confirm and let Katie know.	ARS Update 7/31/17 - Do we want the IsActive field or a way to completely delete users? RJE 3/7/18: Yes, we need to keep the purge function for removing spam accounts, duplicate accounts, etc. Necessary for admin QC of data	8	3	11/17/2016		ARS Update 12/2018: Yes, UserIDs are autoincremented in the DB so won't be reused. TO DO: check DB for foreign keys in related tables	In Progress
Cannot run full user report from reporting module in IE (works in Chrome).			ARS Update 7/31/17 - see Katie's email from 7/18/17 from Norfolk. Currently runs and never results in a download. RJE 4/24/18: Report still down but works for one user in Norfolk		3	7/18/2017		Still working on this! Works on testDB table or if modify code to filter for exact userIDs in prodDB table.	In Progress
Update User Manual	Maintenance		Update user manual with all changes we've made	4	3	11/17/2016		update PPT with new screenshots and save as PDF	In Progress
Add captcha to keep spam users from creating accounts	Enhancement		Manual removal process for now		2	11/17/2016			Not yet scheduled
Add Google Analytics to site	Enhancement		Google analytics will be able to track where site visits are coming from, languages, etc...Pretty cool tool to see how site is used.	3	3	11/17/2016			Not yet scheduled
Fix issues with Google Translate on laptops	Maintenance	Not sure of issue here, just guessed on some hours for helping with troubleshooting. May require visit to users having issues.		2	3	11/17/2016			Not yet scheduled
Add easy ability to clean up business listings.	Enhancement	LOE will be determined after figure out approach.	Revisit this after the QCs are implemented - PDC can probably do this manually. Brent mentioned Factual.com as an option he uses - would have to research how data would be integrated and maintained SMH Update 8/22/16: Gave conservative LOE for now but may need to discuss further once not closer to this task.	20	4	11/17/2016			Not yet scheduled
Look into business listings for standardization									
			Total Not Assigned:						
			Total LOE (not including tasks not yet estimated):	146					
			Total Priority 1:	15					
			Total Priority 2:	70					
			Total Priority 3:	31					
			Total Priority 4:	30					