JBB [8]

PROJECT MANAGEMENT SYSTEM

Welcome back
jbb [3] **[logout]** [2]

Search in Stores [1] for [ ] [4] **Go**   [5] **Log a Call**   [6] **Help**

[7]
| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

---

[7] **Hover states for Menu Tabs**

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add New   Import Data   Modify Info   View Details

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add New   Modify Info   View Details

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add New   Modify Info   View Details   View My Tasks

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Over-due Tasks   Upcoming Milestones   Project Statistics   Year-to-date Reports   Vendor Performance

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add Template   Modify Template   View Template   View Details

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Log Phone Call   View Call Log   Voicemail   Email

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Account Profile   Notification Settings   Alert Settings   Project Dependencies   Rule Settings

Annotations

Footnote	Specification
1	Search will be performed on each listed facet separately: Stores - Contacts - Tasks - Reports - Documents - Communications - Settings - Help
2	Logs user off the system -> Returns to Login Page
3	-> Account Profile Settings Page
4	Sends search request for specified facet and terms -> Search Results Page
5	-> Log a Call Page Accessible from all screens, auto-generates call information if receiving a phone call through this system... ??What about placing a phone call??
6	->Main Help Page
7	Main menu, Access sub-options by hovering over catagory tab
8	->Dashboard Page

PROJECT MANAGEMENT SYSTEM

Welcome back, **jbb** [logout]

Search in [Stores ▼] for [_____] [Go]   [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Dashboard

Action Items ▼

| Items to Approve (0) | VoiceMail Messages (2) | Missed Calls (1) | Recent Changes (2) |

My Task List (3 Tasks Past Due) —

Filter by [Store Number ▼] : [none ▼]

Past Due

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
high	02/16/2009	Waiting for Approval ▼	0859	Receive sign-off	Laura Underwood	02/18/2009
high	03/16/2009	Blocked ▼	0859	Receive payment from liquidator	A & A	
medium	03/16/2009	Blocked ▼	0859	Pay CVS	Susan	

Today

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
high	04/16/2009	Waiting for Approval	0859	Receive sign-off	Laura Underwood	02/18/2009
high	04/16/2009	Blocked	0859	Receive payment from liquidator	A & A	
medium	04/16/2009	Blocked	0859	Pay CVS	Susan	

Future

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
medium	05/16/2009	Open ▼	0859	Reconcile Financials	Susan	
medium	05/16/2009	Open ▼	0859	Rate liquidator performance	A & A	

Milestones ▼

Status	Date	Store	Milestone
Pending Approval	02/16/2009	0859	Sign Off
Not Started	03/16/2009	0859	Payments

1.1. Dashboard

1.1.1. Annotations

Footnote	Specification
1	->Store Detail Project Management Panel
2	Past Due tasks with Scheduled due date in the past - light red background to indicate status (see Project Management Specs)
3	Filter all task by catagory and a possible value
4	Quick indication of the number of Past Due tasks
5	Expandable/Collapsable panel *Initial State = open *click = Close, Panel content hidden, slide below content up, Status icon from Dash to Triangle *click = Open, Panel content appears, slide below content down, Status icon from Triangle to Dash
6	Sort Past due tasks by Priority first
7	Sort secondary by Due Date
8	??Can edit status here? Who can?
9	->Store Details
10	->Contact Details
11	Expandable/Collapsable panel Content of Panel will change with below tabs. *Initial State = open *click = Close, Panel content hidden, slide below content up, Status icon from Dash to Triangle *click = Open, Panel content appears, slide below content down, Status icon from Triangle to Dash
12	Tabs of Types of Action Items with number of the items listed for easy survey. Selected tab will be highlighted and content will appear Action Item panel. If Action Item Panel state is Closed then Open.

JBB PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] [3] for [_____] [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Store Details [5]   [Save Edits] [4] [Clear Edits]

| **Store Number:** 0859 | **Status:** [Active ▾] [6] | **Company:** CVS |

Project Number: **Fixture Liquidator:** A & A   **Region:** 11
JBB Refernce #:   **Store Setup Manager:**   **District:** 11
                                                                     Area: 16
Contact Info   **Zone:** 31
   Phone: 413-786-4100
   Fax: 413-786-4198

Address: 287 Springfield Avenue
   City: Agawam   **State:** MA   **Postal Code:** 01001

Store Information [7]   ▼ [8]

Store Type: Freestand   **Distribution Center:** Woonsocket, RI   **Store Features:**
Retail Sq Ft: 801   **Acquisition Code:** ZZ   [Add... ▾]
Holding Type: Lease   [Add] [1]

Major Region - Code: 1   Name: Northeast   Pharmacy
County Name - Code: 25013   Name: Hampden County, MA   Photo Printing
MSA - Code: 44140   Geography: Springfield, MA Metro   Drive Thru
Report Market - Code: 7000   Name: Springfield, Ma

New Store Location: **(X) Delete** [2]
Address:

Client Information   ▼

Client Contacts

Name	Title	Phone	E-mail
Jane Boyd	Regional Healthcare Manager	(413) 672-1993	jboyd@cvs.com
Dave Fazzino	District Manager	(413) 998-2372	dcfazzino@cvs.com
Erika Wilson Kerr	Region Manager	(413) 345-1116	eckerr@cvs.com
Laura Underwood	Area Manager	(413) 345-9273	lunderwood@cvs.com

Project Management   ▼

Complete	**Store Survey** - Milestone Date: 09/03/2008		
	Complete **Generate Survey Form**	**Scheduled:** 08/15/2008	**Actual:** 08/13/2008
	Owner: Josie	Comments:	
	Complete **Send Survey Form**	**Scheduled:** 08/18/2008	**Actual:** 08/15/2008
	Owner: Josie	Comments:	
	Late **Complete Survey**	**Scheduled:** 08/25/2008	**Actual:** 09/01/2008
	Owner: Dave Fazzino	Comments:	
	Complete **Review Completed Survey**	**Scheduled:** 09/05/2008	**Actual:** 09/03/2008

1.2. Store Details Exploded

1.2.1. Annotations

Footnote	Specification
1	Add selection from dropdown box to Store Features list
2	Remove selection from Store Features list
3	Search will be performed on each listed facet separately: Stores - Contacts - Tasks - Reports - Documents - Communications - Settings - Help
4	Save and Clear button initially begin as inactive and will become active after the first edits are made to teh page.
5	Text fields for data are editable when double clicked. Text field becomes a textbox.
6	Unsure about spec
7	
8	Panel state icon: -Triangle = closed -dash = open

	Complete	Review Completed Survey	Scheduled: 09/03/2008	Actual: 09/03/2008
		Owner: Josie	Comments:	

Late	**Bid Packet** - Milestone Date: 10/15/2008

	Complete	**Generate Bid Packet**	**Scheduled**: 09/10/2008	**Actual**: 09/08/2008
		Owner: Josie	Comments:	
		Generate bid packet and auto vendor selection		

	Complete	**Solicit Bids**	**Scheduled**: 09/12/2008	**Actual**: 09/10/2008
		Owner: Josie	Comments:	
	Received	A & A Sales & Services	Deadline: 10/03/2008	Received: 09/20/2008
	Received	US Fixtures	Deadline: 10/03/2008	Received: 10/01/2008
	Late	Store Design Consultant	Deadline: 10/03/2008	Received: 10/10/2008

	Late	**Evaluate Bids**	**Scheduled**: 10/15/2008	**Actual**: 10/20/2008
		Owner: Josie	Comments:	
		View and evaluate bids received		

Complete	**Contract** - Milestone Date: 11/15/2008

	Complete	**Select a Vendor for Contract**	**Scheduled**: 10/31/2008	**Actual**: 10/31/2008
		Owner: Josh	Comments:	
	Complete	**Execute Contract**	**Scheduled**: 11/15/2008	**Actual**: 11/10/2008
		Owner: Josh	Comments:	

Status / **Pending Approval**	**Sign Off** - Milestone Date: 02/16/2009

	Late	**Start Liquidation**	**Scheduled**: 01/17/2009	**Actual**: 01/21/2009
		Owner: Dave Fazzino	Comments:	
	Late	**Complete Liquidation**	**Scheduled**: 01/19/2009	**Actual**: 02/06/2009
		Owner: A & A Sales and Services	Comments:	
	Status	**Complete Cleaning**	**Scheduled**: 02/09/2009	**Actual**: 09/16/2009
		Owner: A & A Sales and Services	Comments:	
	Status	**Receive Sign Off**	**Scheduled: 02/16/2009**	**Pending Approval**
		Owner: Laura Underwood	Comments:	

Not Started	**Payments** - Milestone Date: 03/16/2009

	Not Started	**Vendor Accounts Receivable**	**Scheduled**: 03/09/2009	
		Owner:	Comments:	
	Not Started	**Vendor Accounts Payable**	**Scheduled**: 03/16/2009	
		Owner:	Comments:	
	Not Started	**Client Accounts Receivable**	**Scheduled**: 03/16/2009	
		Owner:	Comments:	
	Not Started	**Client Accounts Payable**	**Scheduled**: 03/16/2009	
		Owner:	Comments:	

Vendor Information ▼

	Vendor Name	Project Type	Company Address	Project Manager	Phone Number	E-mail
add review / view review	A & A Sales & Services	Contracted	123 Main Street, Springfield, MA, 01104	Joe Smith	413-555-3456	Joe.smith&aanda.com
add review / view review	US Fixtures	Bid Submitted	657 First Avenue, Springfield, MA, 01104	Bob Sanford	413-834-7787	bSanford@usfixtures.com
add review / view review	Store Design Consultant	Bid Submitted	887 Broadway Street, Springfield, MA, 01104	Dan Westbrook	413-354-9845	dan@sdconsultant.com

Tasks ▼

Filter by [Store Number ▼] : [none ▼]

Past Due

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
high	02/16/2009	Waiting for Approval ▼	0859	Receive sign-off	Laura Underwood	02/18/2009
high	03/16/2009	Blocked ▼	0859	Receive payment from liquidator	A & A	
medium	03/16/2009	Blocked ▼	0859	Pay CVS	Susan	

Today

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
high	04/16/2009	Open ▼	0859	Receive sign-off	Laura Underwood	02/18/2009
high	04/16/2009	Open ▼	0859	Receive payment from liquidator	A & A	
medium	04/16/2009	Blocked ▼	0859	Pay CVS	Susan	

Future

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
medium	05/16/2009	Open ▼	0859	Reconcile Financials	Susan	
medium	05/16/2009	Open ▼	0859	Rate liquidator performance	A & A	

Complete Tasks

Due Date	Completed Date	Schedule Impact	Task Name	Priority	Owners	Last Action
08/15/2008	08/13/2008	Early	Generate survey form	medium	Josie	08/13/2008
08/15/2008	08/15/2008	Early	Send Survey for	medium	Josie	08/15/2008
08/25/2008	09/01/2008	Late	Complete survey form	high	Dave Fazzino	09/01/2008
09/05/2008	09/03/2008	Early	Review completed survey	medium	Josie	09/03/2008
09/10/2008	09/08/2008	Early	Generate bid packet	medium	Josie	09/08/2008
09/12/2008	09/10/2008	Early	Solicit bids	medium	Josie	09/10/2008
10/15/2008	10/20/2008	Late	Evaluate bids	high	Josie	10/20/2008
10/31/2008	10/31/2008	On Time	Select vendor	high	Josh	10/31/2008
11/15/2008	11/10/2008	Early	Execute contract	medium	Josh	11/10/2008
01/07/2009	01/21/2009	Late	Start liquidation	high	A & A	01/21/2008
01/29/2009	02/6/2009	Late	Complete liquidation	high	A & A	02/06/2009
02/09/2009	02/09/2009	On Time	Complete cleaning	high	A & A	02/09/2009

Documents ▼

File Name	Type	Size	Last Modified	Created By	Notes
Contract	PDF	1.5 MB	11/10/2008	JBB	
Permission to Enter	PDF	103 KB	12/20/2008	JBB	
Manager Office	JPEG	3.0 MB	03/01/2009	A & A	

Communication ▼

Date	From	To	Type	Store	View	Topic
08/15/2008	JBB	Dave Fazzino	E-mail	00859	View	Please fill out store survey
09/10/2008	Dave Fazzino	JBB	E-mail	00859	View	Completed store survey submitted
09/10/2008	JBB	A & A	E-mail	00859	View	Please fill out bid packet online
09/20/2008	A & A	JBB	E-mail	00859	View	Complete bid packet submitted
01/05/2009	Josie	Dave Fazzino	Call Log	00859	View	Liquor Certificate
01/19/2009	Josie	Dave Fazzino	Call Log	00859	View	Store access by vendor
01/22/2009	Joe Smith	Josie	Call Log	00859	View	Need access to store
02/12/2009	Josie	Joe Smith	E-mail	00859	View	Reminder: complete sign-off checklist
02/16/2009	Josie	Joe Smith	Call Log	00859	View	Need to provide completed checklist
02/28/2009	Josie	Laura Underwood	Call Log	00859	View	Please approve sign off

Finance ▼

Store Number	Type	Status	Contracted Amount	Payment Amount	Payment Type	Contract Payment Date	Actual Payment Date	Transaction Referecnce Number
00859	AR	Late	$7500.00			03/09/2009		

JBB PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] for [＿＿＿＿＿＿＿] [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Store Details [1]

[Save Edits] [6] [5] [Clear Edits] [7]

| **Store Number:** 0859 | **Status:** [Active ▾] [2] | **Company:** CVS |

Project Number: 　　　　　**Fixture Liquidator:** A & A 　　　　　**Region:** 11
JBB Refernce #: 　　　　　**Store Setup Manager:** 　　　　　**District:** 11
　　　　　　　　　　　　　　　　　　　　　　　　　　　　Area: 16
　　　　　　　　　　　　　　　　　　　　　　　　　　　　Zone: 31

Contact Info
Phone: 413-786-4100
Fax: 413-786-4198
Address: 287 Springfield Avenue
City: Agawam 　　**State:** MA 　　**Postal Code:** 01001

Store Information [3]	▼ [4]
Client Information	▼
Project Management	▼
Vendor Information	▼
Tasks	▼
Documents	▼
Communication	▼
Finance	▼

1.3. Store Details Collapsed

1.3.1. Annotations

Footnote	Specification
1	Text fields for data are editable when double clicked. Text field becomes a textbox.
2	Unsure about spec, is this editable from this screen or automatically generated from Project Management Panel -Assigned -Canceled -Active -Out-to-Bid -Wrap-up -Complete
3	Panel initially closed - open on click
4	Panel state icon: -Upside-down Triangle = closed -dash = open
5	Save and Clear button initially begin as inactive and will become active after the first edits are made to teh page.
6	->Confirm Save Lightbox State
7	->Clear Edits Lightbox State

Store Information   ▼

Store Type: Freestand   **Distribution Center:** Woonsocket, RI   **Store Features:**
Retail Sq Ft: 801   **Acquisition Code:** ZZ   [Add... ▾]

Pharmacy
Photo Printing
Drive Thru

[Add] [1]

Major Region - Code: 1   Name: Northeast
County Name - Code: 25013   Name: Hampden County, MA
MSA - Code: 44140   Geography: Springfield, MA Metro
Report Market - Code: 7000   Name: Springfield, Ma

[(X) Delete] [2]

New Store Location: [3]
Address:

Client Information   ▼

Client Contacts

Name [4]	Title	Phone [6]	E-mail [5]
Jane Boyd	Regional Healthcare Manager	(413) 672-1993 Call-icon	jboyd@cvs.com
Dave Fazzino	District Manager	(413) 998-2372 Call-icon	dcfazzino@cvs.com
Erika Wilson Kerr	Region Manager	(413) 345-1116 Call-icon	eckerr@cvs.com
Laura Underwood	Area Manager	(413) 345-9273 Call-icon	lunderwood@cvs.com

Vendor Information   ▼

	Vendor Name [8]	Project Type	Company Address	Project Manager	Phone Number	E-mail
add review / view review [7]	A & A Sales & Services	Contracted	123 Main Street, Springfield, MA, 01104	Joe Smith	413-555-3456	Joe.smith&aanda.com
add review / view review	US Fixtures	Bid Submitted	657 First Avenue, Springfield, MA, 01104	Bob Sanford	413-834-7787	bSanford@usfixtures.com
add review / view review	Store Design Consultant	Bid Submitted	887 Broadway Street, Springfield, MA, 01104	Dan Westbrook	413-354-9845	dan@sdconsultant.com

1.4. Store Details Panel - Store, Client and Vendor Information

1.4.1. Annotations

Footnote	Specification
1	Add selection from dropdown box to Store Features list
2	Remove selection from Store Features list
3	Only active for relocation project. Grayed out and inactive for all others.
4	-> Contact Details
5	mailto links on click ->New e-mail addressed to contact with Store Number in the subject
6	Call icon, On-click place call to associated phone number
7	Vendor Review links ->Add a Review (Auto completes the review information about store/project) ->View Vendor Reviews Summary (To page that summarizes the vendor views?)
8	->Vendor Details

Project Management ▼

Status [2] Store Survey - Milestone Date: 09/03/2008 [4]

Status [5]	Generate Survey Form [6]	Scheduled: 08/15/2008	Actual: 08/13/2008 [7] [8]
	Owner: Josie [3]	Comments:	
Status	Send Survey Form	Scheduled: 08/18/2008	Actual: 08/15/2008
	Owner: Josie	Comments:	
Status	Complete Survey	Scheduled: 08/25/2008	Actual: 09/01/2008
	Owner: Dave Fazzino	Comments:	
Status	Review Completed Survey	Scheduled: 09/05/2008	Actual: 09/03/2008
	Owner: Josie	Comments:	

Status Bid Packet - Milestone Date: 10/15/2008

Status	Generate Bid Packet	Scheduled: 09/10/2008	Actual: 09/08/2008
	Owner: Josie	Comments:	
	Generate bid packet and auto vendor selection [9]		
Status	Solicit Bids	Scheduled: 09/12/2008	Actual: 09/10/2008
	Owner: Josie	Comments:	

Status	A & A Sales & Services	Deadline: 10/03/2008	Received: 09/20/2008
Status	US Fixtures	Deadline: 10/03/2008	Received: 10/01/2008
Status	Store Design Consultant	Deadline: 10/03/2008	Received: 10/10/2008

Status	Evaluate Bids	Scheduled: 10/15/2008	Actual: 10/20/2008
	Owner: Josie	Comments: [10]	
	View and evaluate bids received		

Status Contract - Milestone Date: 11/15/2008

Status	Select a Vendor for Contract	Scheduled: 10/31/2008	Actual: 10/31/2008
	Owner: Josh	Comments:	
Status	Execute Contract	Scheduled: 11/15/2008	Actual: 11/10/2008
	Owner: Josh	Comments:	

Status Sign Off - Milestone Date: 02/16/2009

Notifications [1]

Status	Start Liquidation	Scheduled: 01/17/2009	Actual: 01/21/2009
	Owner: Dave Fazzino	Comments:	
Status	Complete Liquidation	Scheduled: 01/19/2009	Actual: 02/06/2009
	Owner: A & A Sales and Services	Comments:	
Status	Complete Cleaning	Scheduled: 02/09/2009	Actual: 09/16/2009
	Owner: A & A Sales and Services	Comments:	
Status	Receive Sign Off	Scheduled: 02/16/2009	Pending Approval
	Owner: Laura Underwood	Comments:	

Status Payments - Milestone Date: 03/16/2009

Status	Vendor Accounts Receivable	Scheduled: 03/09/2009
	Owner:	Comments:
Status	Vendor Accounts Payable	Scheduled: 03/16/2009
	Owner:	Comments:
Status	Client Accounts Receivable	Scheduled: 03/16/2009
	Owner:	Comments:

Status	Client Accounts Payable	Scheduled: 03/16/2009
	Owner:	Comments:

1.5. Store Details Panel - Project Management

1.5.1. Annotations

Footnote	Specification
1	Notifications and note about pending status (ie: Pending Approval)
2	Status indication of the state of the milestone **See Project Management Status Visualizations and State Examples -Not Started -On Schedule -Behind -Past Due -Completed -Late
3	->Contact Details for the owner of of the task
4	Title of Milestone and date that it is scheduled to be due Automatically generated?
5	Status of a task listed under a milestone -Not Started -On Schedule -Past Due -Completed -Late
6	Date the task is scheduled to be completed
7	The actual date the task is completed. 5 states: -not complete & not late -not complete & past due -task pending approval -completed -completed late
8	Editable textfield for saving notes about tasks
9	Link to specific task action need to complete task ->Generate Bid Packet
10	Link to specific task action need to complete task ->View and Evaluate Bids

Tasks [1]

Filter by Priority [2] : none [4] ▼

Past Due

Priority [8]	Due Date [7]	Status [6]	Store Number [3]	Task Name	Owners [5]	Last Action
high	02/16/2009	Waiting for Approval ▼	0859	Receive sign-off	Laura Underwood	02/18/2009
high	03/16/2009	Blocked ▼	0859	Receive payment from liquidator	A & A	
medium	03/16/2009	Blocked ▼	0859	Pay CVS	Susan	

Today

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
high	04/16/2009	Open ▼	0859	Receive sign-off	Laura Underwood	02/18/2009
high	04/16/2009	Open ▼	0859	Receive payment from liquidator	A & A	
medium	04/16/2009	Blocked ▼	0859	Pay CVS	Susan	

Future

Priority	Due Date	Status	Store Number	Task Name	Owners	Last Action
medium	05/16/2009	Open ▼	0859	Reconcile Financials	Susan	
medium	05/16/2009	Open ▼	0859	Rate liquidator performance	A & A	

Complete Tasks

Due Date	Completed Date	Schedule Impact [9]	Task Name	Priority [11]	Owners [10]	Last Action
08/15/2008	08/13/2008	Early	Generate survey form	medium	Josie	08/13/2008
08/15/2008	08/15/2008	Early	Send Survey for	medium	Josie	08/15/2008
08/25/2008	09/01/2008	Late	Complete survey form	high	Dave Fazzino	09/01/2008
09/05/2008	09/03/2008	Early	Review completed survey	medium	Josie	09/03/2008
09/10/2008	09/08/2008	Early	Generate bid packet	medium	Josie	09/08/2008
09/12/2008	09/10/2008	Early	Solicit bids	medium	Josie	09/10/2008
10/15/2008	10/20/2008	Late	Evaluate bids	high	Josie	10/20/2008
10/31/2008	10/31/2008	On Time	Select vendor	high	Josh	10/31/2008
11/15/2008	11/10/2008	Early	Execute contract	medium	Josh	11/10/2008
01/07/2009	01/21/2009	Late	Start liquidation	high	A & A	01/21/2008
01/29/2009	02/6/2009	Late	Complete liquidation	high	A & A	02/06/2009
02/09/2009	02/09/2009	On Time	Complete cleaning	high	A & A	02/09/2009

1.6. Store Details Panel - Tasks

1.6.1. Annotations

Footnote	Specification
1	All tasks associated with a particular store
2	Filter the listed task by certain catagories to show only those that meet criteria for catagory - Priority - Status - Owner
3	Not sure if this is needed - all have the same store
4	Selections for filter automatically populated by the data in the fields if the selected catagory
5	->Contact/Vendor Details (if present)
6	How are these tasks status changed? Automatically from these drop down? Who has permission for which ones? How does this impact the PM Panel? -Open -Blocked -Waiting for Approval -Completed -Reassigned -Request Approval -No Longer Applicable
7	First criteria to sort by
8	Secondary criteria to sort by ->high ->medium ->low
9	Task Impacts on the schedule, background color of the task indicates impact.
10	-> Contact Details
11	Priority of the task ->high ->medium ->low

Documents ▼

File Name [1]	Type	Size	Last Modified	Created By	Notes
Contract	PDF	1.5 MB	11/10/2008	JBB	
Permission to Enter	PDF	103 KB	12/20/2008	JBB	
Manager Office	JPEG	3.0 MB	03/01/2009	A & A	

Communication ▼

Date	From	To	Type	Store	View [2]	Topic
08/15/2008	JBB	Dave Fazzino	E-mail	00859	View	Please fill out store survey
09/10/2008	Dave Fazzino	JBB	E-mail	00859	View	Completed store survey submitted
09/10/2008	JBB	A & A	E-mail	00859	View	Please fill out bid packet online
09/20/2008	A & A	JBB	E-mail	00859	View	Complete bid packet submitted
01/05/2009	Josie	Dave Fazzino	Call Log	00859	View	Liquor Certificate
01/19/2009	Josie	Dave Fazzino	Call Log	00859	View	Store access by vendor
01/22/2009	Joe Smith	Josie	Call Log	00859	View	Need access to store
02/12/2009	Josie	Joe Smith	E-mail	00859	View	Reminder: complete sign-off checklist
02/16/2009	Josie	Joe Smith	Call Log	00859	View	Need to provide completed checklist
02/28/2009	Josie	Laura Underwood	Call Log	00859	View	Please approve sign off

Finance ▼

Store Number	Type	Status	Contracted Amount	Payment Amount	Payment Type	Contract Payment Date	Actual Payment Date	Transaction Referecnce Number
00859	AR	Late	$7500.00			03/09/2009		

1.7. Store Details Panel - Documents, Communication, Finance

1.7.1. Annotations

Footnote	Specification
1	->Download file
2	->Communication page (call log, e-mail)

JBB PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] for [_____] [Go] [Log a Call] [Help]

Dashboard	Stores	Contacts	Tasks	Reports	Documents	Communication	Settings

Find Vendors and Send Bid Packets

Store Number: 0859 [2]   **Company:** CVS   **City:** Agawam

Vendor Search Criteria

Performance Rating [9]	Min: [Choose... ▾]	Max: [Choose... ▾]
Proximity to Store [10]	Min: [Choose... ▾]	Max: [Choose... ▾]
Number of Current Projects	Min: [0 ▴▾] [11]	Max: [0 ▴▾]
Number of Completed Projects of Similar Scope	Min: [0 ▴▾]	Max: [0 ▴▾]

[**Find Vendors**] [3]

Available Vendors [4]

Select for Bid Packet [8]	Company [5]	Address	Phone	Contact [6]	E-mail	Performance Rating [7]	Proximity	Current Projects	Similar Projects
☐	A&A Sales and Services	123 Main Street Springfield, MA 01104	413-555-3456	Joe Smith	Joe.smith@aanda.com	4 Stars	5 Miles	4	13
☐	Us Fixtures	657 First Avenue, Springfield MA 01104	413-834-7787	Bob Sanford	bSanford@usfixtures.com	4 Stars	10 Miles	10	5
☐	Store Desing Consultant	887 Broadway Street, Springfield, MA 01104	413-354-9845	Dan Westbrook	dan@sdconsultant.com	3 Stars	10 Miles	7	0
☐	City Store Fixtures, Inc.	25 Foster Road, Worcester, MA 01601	508-435-8787	Lisa Deitz	lisa@csfixturesinc.com	4.5 Stars	50 Miles	8	8

[**Select Vendors**] [12]

Lightbox for Confirm Selected Vendors State

Vendors Selected for Bid Packets

- A & A Sales and Services [13]
- US Fixtures
- Store Design Consultant

'Confirm' will submit these vendors to Manager for Bid Packet approval.

[**Confirm and Submit**] [14]   [**Return to Selection**] [15]

Confirmation: Bid Packets Submitted to Manager for Approval [16]

View submitted vendors [17]   close message [1]

1.8. Generate Bid Packet

1.8.1. Annotations

Footnote	Specification
1	Close the Confirmation Message and slide all content up
2	->Store Details
3	Perform search of Vendors based on specified criteria *Returns results in Available Vendors
4	No visiable in initial state *Appears whenFind Vendors is performed
5	->Vendor Details
6	Contact Details
7	->Vendor Performance Summarty
8	Able to select multiple vendors to send bid packets too.
9	Specify vendors by star rating - 1/2 -1 -1 1/2 -2 -2 1/2 -3 -3 1/2 -4 -4 1/2 -5
10	Specify location of vendor in miles relative to the store location -0 to 4.9 Miles -5 to 10 Miles -10 to 25 Miles -25 to 50 Miles -50+ Miles
11	Counter numberboxes, values can be manually add too
12	*Selected Vendors Confirmation Lightbox appears for confirmation of selections
13	List Selected from Available Vendors table
14	->Store Details *with Confirmation Massage Generate approval task for Manager
15	*Close Lightbox and remain on the page
16	Confirmation Message that appears on the Store Details page
17	->Store Details (Project Management Panel) or Recent Changes

Welcome back,
jbb   [logout]

Search in [Stores ▾] for [_____] [Go]

[Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Select Winning Bid Packet

Select for Winner [2]	Select for Secondary [8]	Bid Packet [1]	Company [3]	Phone	Contact [4]	E-mail	Performance Rating [5]	Proximity	Current Projects	Similar Projects
☐	☐	Received Ontime	A&A Sales and Services	413-555-3456	Joe Smith	Joe.smith@aanda.com	4 Stars	5 Miles	4	13
☐	☐	Received Ontime	Us Fixtures	413-834-7787	Bob Sanford	bSanford@usfixtures.com	4 Stars	10 Miles	10	5
☐	☐	Received Late	Store Desing Consultant	413-354-9845	Dan Westbrook	dan@sdconsultant.com	3 Stars	10 Miles	7	0

[Submit for Approval] [6]   [Cancel] [7]

Lightbox for Confirm Winning Vendors State

Select Winning Bids

Bid Winner - A & A Sales and Services
Secondary - Store Design Consultant

'Confirm' will submit these vendors to Manager for approval. [9]

[Confirm and Submit]   [Return to Selection] [10]

Confirmation: Bid Packets Submitted to Manager for Approval [12]

View submitted vendors [13]   close message [11]

1.9. Evaluate Bid Packets

1.9.1. Annotations

Footnote	Specification
1	Indicating status and schedule impact of vendors submission - see Project Management specs ->View bid packet submission ??How is it viewed (document, page)??
2	One selection allowed for the winning vendor - one selection is required to submit
3	->Vendor Details
4	Contact Details
5	->Performance Rating Summary
6	*Appearing Confirm Selected Winning Bids Lightbox
7	->Store Details
8	One selection allow - selection is optional
9	->Store Details *with Confirmation Massage Generate approval task for Manager
10	*Close Lightbox and remain on the page
11	Close the Confirmation Message and slide all content up
12	Confirmation Message that appears on the Store Details page
13	->Store Details (Project Management Panel) or Recent Changes

Search in [Stores ▾] for [_____] [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add a New Store

* = Required   `14`

*Company:	[Select a Company... ▾]
*Store Number:	[_____]

Location

*Region:	[... ▾]	***District:**	[... ▾]	***Area:**	[... ▾]	***Zone:**	[... ▾]

*Major Region Code: [... ▾]   ***Major Region:** [Choose a Region... ▾]

*County Code: [_____]   ***County Name:** [_____]

*MSA Code: [_____]   ***MSA Geography:** [_____]

*Report Market Code: [_____]   ***Report Market:** [_____]

*Distribution Center: [Choose Distribution Center... ▾]

Contact Info

*Phone: [_____]   ***Fax:** [_____]

Street Addrees: [_____]

City: [_____]   **State:** [_____]   **Postal Code:** [_____]

Project Info

*Project Number: [asw]   ***Project Type:** [_____ ▾]

*Retail Sq Ft: [_____]   ***Holding Type:** [Choose... ▾]

*Store Type: [Choose a Store Type... ▾]   ***Acquisition Code:** [... ▾]

Pour RA: [_____]   **Fixture Disposition:** [_____]

Perspective Buyer: [_____]   **Key Number:** [_____]

Project Note: [enter text...]

Store Configuration

Store Feature   Possible Features to Add

[ ]	[24 Hours / Apothecary / Drive Thru / Phamacy / Photo Printing / Procare]

[◀+] `15`
[─▶] `16`

Schedule

`1`   `5`

*Store Close Date:	Scheduled Start Date:
Store Opening Date:	Scheduled Completion Date:
*Est. Liquidation Date:	Assigned Date:
*Lease End Date:	Extended Lease Date:
	Sale Begin Date:
	Sale End Date:
	Broom Clean Date:
	Projected Phamacy Close Date:
	Actual Pharmacy Close Date:

Preview & Create   Save Draft   Cancel

1.10. Add a New Store

1.10.1. Annotations

Footnote	Specification
1	*Date Picker Popup
2	Grayed out and inactive when not a relocation project *Date Picker Popup
3	*Date Picker Popup
4	*Date Picker Popup
5	*Date Picker Popup
6	*Date Picker Popup
7	*Date Picker Popup
8	*Date Picker Popup
9	*Date Picker Popup
10	*Date Picker Popup
11	*Date Picker Popup
12	*Date Picker Popup
13	*Date Picker Popup
14	Indication of all require fields to create a new store
15	Moves selected possible feature to the Store Feature
16	Removes any selected Store Feature and lists in Possible Features to Add box
17	->Add Store Preview
18	Saves new store data as a draft ??How to access Draft??
19	->Dashboard Page

JBB

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▼] for [   ]   [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Review New Store & Confirm Add [1]

Company: CVS   **Store Number:** 0859

Location

Major Region Code: 1   **Major Region:** Northeast
County Code: 25013   **County Name:** Hampden County, MA
MSA Code: 44140   **MSA Geography:** Springfield, MA Metro
Report Market Code: 7000   **Report Market:** Springfield, Ma
Distribution Center: Woonsocket, RI

Contact

Phone: 413-786-4100   **Fax:** 413-786-4198
Street Addrees: 278 Springfield Avenue
City: Agawam   **State:** MA

Project Info

Project Number: **Project Type:**
Retail Sq Ft: 801   **Holding Type:**
Store Type: Freestand
Pour RA: **Fixture Disposition:**
Perspective Buyer: **Key Number:**
Project Note:

Store Features: Pharmacy
Photo Printing
Drive Thru

Schedule Dates

Store Close Date: 12/08/2008   **Scheduled Start:**
Store Opening Date: **Scheduled Completion:**
Lease End Date: 03/09/2009   **Assigned:**
01/19/2009   **Extended Lease:**
Sale Begin:
Sale End:
Broom Clean:
Projected Phamacy Close:
Actual Pharmacy Close:

[Create Store [2]]   [Cancel [4]]   [Edit [3]]

Confirmation: Store Added [6]

[View Recent Change Information [7]](#)   [close message [5]](#)

1.11. Add Store Confirmation

1.11.1. Annotations

Footnote	Specification
1	?? Should the text fields be editable or go back to Add Store page to make edits??
2	->Store Details *with Store Added Confirmation message
3	->Add a New Store *with all current data pre-filled
4	->Dashboard
5	Close the Confirmation Message and slide all content up
6	Confirmation Message that appears on the Store Details page
7	->Store Details (Project Management Panel) or Recent Changes

JBB
ENTERPRISES, LLC

Store Survey Form

Store #	Address	City	State	Postal Code	Phone #	Store Manager
00859	278 Springfield Avenue	Agawam	MA	01001	(857) 998-2372	Dave Fazzino

Fixture Inventory

Fixture Type	Quantity	Photo [1]
Uniweb Shelving		add photo
Metal Cage		add photo
Foam Letters		add photo
Cubicle Walls		add photo
Countertops		add photo
Desks		add photo
Bookcases		add photo
Safes		add photo
Plumbing		add photo
Sinks		add photo
Extra Ceiling Tiles		add photo
Ceiling Installed Speaker		add photo
Exterior Building Signage		add photo
Drinking Fountain		add photo
Carpet		add photo
Floor Tiles		add photo
Rolling Ladders		add photo
Conveyor		add photo
Dock Plates		add photo
Exterior Hydraulic Lifts		add photo
HVAC System		add photo
Special Displays		add photo
Others (please specify)		add photo

enter text...

Equipment Inventory

Equipment Type	Model	Quantity	Vendor to Remove?	Photo
Refrigeration			☐	add photo
ATM Equipment			☐	add photo
Blood Pressure Machine			☐	add photo
Copier / Fax			☐	add photo
Compacter			☐	add photo

Baler			☐	add photo
Key Cutting Equipment			☐	add photo
Photo Lab			☐	add photo
Ice Machine			☐	add photo
Vending Machine			☐	add photo
Lottery Machine			☐	add photo
Gaming Equipment			☐	add photo
Cash Register			☐	add photo
POS / Computer			☐	add photo
Telephone			☐	add photo
Security Equipment			☐	add photo
Floor Cleaning Equipment			☐	add photo
Stamp Dispenser			☐	add photo
Rooftop Satellite			☐	add photo
Kiddie Rides			☐	add photo
Price / Coupon Checker			☐	add photo
Hand Trucks			☐	add photo
Pallet Jacks			☐	add photo
Shopping Carts			☐	add photo
Shopping Totes			☐	add photo
Shopping Baskets			☐	add photo
Pricing Guns			☐	add photo
Others (please specify)			☐	add photo

enter text...

Submit [2]   Save Draft   Cancel

1.12. Store Survey

1.12.1. Annotations

Footnote	Specification
1	Add photo to Survey ->Browse Computer for for window *List file name to right when uploaded
2	->Confirmation and Thank you message

JBB

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] for [_____] [Go]   [Log a Call]   [Help]

Dashboard	Stores	Contacts	Tasks	Reports	Documents	Communication	Settings

List Stores

Filter by... `9`

Company: `3` [CVS (2731) ▾]

Location: `4` [Massachusetts (38) ▾] [Agawam (9) ▾] [Choose Zipcode... ▾]

Project State: `7` [Active (5) ▾]

Store Type: `8` [Choose... ▾]   [Clear Filters `6`]   [Find Stores `1`]

5 Stores Matching Criteria `2`

Status	Store Number `5`	Company	Region	District	Area	Store Type	City	Scheduled Completion	Lease End Date
Active	0211	CVS	16	1	11	Freestanding	Agawam	3/19/09	05/09/09
Active	0399	CVS	13	1	11	Regional Mall	Agawam	2/02/09	04/17/09
Active	0688	CVS	8	1	12	Strip Shopping Center	Agawam	1/10/09	03/09/09
Active	0859	CVS	1	2	12	Downtown	Agawam	2/04/09	04/19/09
Active	0921	CVS	9	2	11	Freestanding	Agawam	1/19/09	03/09/09

1.13. List Stores

1.13.1. Annotations

Footnote	Specification
1	Perform search of stores based on specified criteria *Returns results below
2	Not visible in initial state *Appears when Find Stores is performed Note that the number of results is shown.
3	Specify company - Albertsons - CVS - RiteAid - Walgreens
4	Specify location broken down by state, city, and zipcode. Contents of dropdown boxes are dynamically populated based on matches in the database. Only states, cities, and zipcodes which are associated with store records are shown.
5	->Store Details
6	Return all filters to default (unselected) values.
7	Specify state of project: - active - completed - cancelled question: any other project states?
8	Specify the type of store: - Convenience Shopping Center - Downtown - Freestanding - Freestanding Pad Site - Regional Mall - Special Use - Strip Shopping Center - Unknown Store Type
9	Every item (except the default value) in each dropdown box contains a number in parentheses. The value indicates the number of records that will be returned when this search is performed. In the example, there are 2731 total CVS stores, 38 of these stores exist in Massachusetts, 9 CVS stores in Massachusetts are in Agawam, and of theses stores only 5 are active. Thus, whenever a value is selected, the system will refresh the count values in the combo boxes on rows to the right of it (for location) and below it. Since top to bottom ordering matters, we should attempt to organize these in the way that makes the most sense...

JBB PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] for [ ] [Go] [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Contact Details [1]

[Save Edits] [2]   [Clear Edits] [3]

Name: Dave Fazzino	**Company:** CVS	**JBB Relationship:** Client

E-mail: dcfazzino@cvs.com   Call Icon [5] **Office Title:** District Manager
Phone Number: 413-998-2372   Call Icon **Office Address**
Cell Number: 413-291-0002   Call Icon **Street:** 819 Main Street
Fax Number: 847-938-1331 **City:** Springfield **State:** MA **Zip:** 01001

Assistant Info [4] **Phone Number:**
Assistance's Name: **Cell Number:**
E-mail: **Fax Number:**

Stores [9] ▼

Status [8]	Store Number [6]	Company	Region	District	Area	Store Type	City	Scheduled Completion
Active ▾	0373	CVS	16	11	11	Strip Shopping Center	Holyoke	
Active ▾	0447	CVS	16	11	11	Freestanding	Northampton	
Active ▾	0488	CVS	16	11	11	Freestanding	Springfield	
Active ▾	0517	CVS	16	11	11	Strip Shopping Center	Longmeadow	
Active ▾	0693	CVS	16	11	11	Freestanding	Chicopee	
On hold ▾	0769	CVS	16	11	11	Freestanding	East Longmeadow	
On hold ▾	0818	CVS	16	11	11	Freestanding	Amherst	
On hold ▾	0843	CVS	16	11	11	Convenience Shopping Center	Chicopee	
Active ▾	0859	CVS	16	11	11	Freestanding	Agawam	1/19/09

Communication ▼

Date	From	To	Type	Store [7]	View	Topic
08/15/2008	JBB	Dave Fazzino	E-mail	00859	View	Please fill out store survey online
09/10/2008	Dave Fazzino	JBB	E-mail	00859	View	Completed store sruvey submitted
11/10/2008	JBB	Dave Fazzino	E-mail	00373	View	Please fill out store survey online
01/05/2009	Josie	Dave Fazzino	Call Log	00859	View	Liquor Certificate
01/19/2009	Josie	Dave Fazzino	Call Log	00859	View	Store access by vendor

Documents ▼

1.14. Contact Details

1.14.1. Annotations

Footnote	Specification
1	Text fields for data are editable when double clicked. Text field becomes a textbox.
2	->Confirm Save Lightbox State
3	->Clear Edits Lightbox State
4	Assistance Information is grayed out and inactive if there is no associated assistant
5	Call icon to begin call with the system
6	->Store Details
7	->Store Details
8	??How does Status change on this screen??
9	Collapsible/Expandable Panels - Default as closed - Open on click - triangle status icon to dash - Close on click - dash status icon to triangle

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▼] for [＿＿＿＿＿＿＿] [Go] [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Vendor Details [6]

[Save Edits] [2] [Clear Edits] [3] [1]

| **Name:** A & A Sales and Services | **Performance Rating:** ★★★★☆ [7] |

Primary Contact: Joe Smith   **Coverage Area:** MA, NH, CT

E-mail: Joe.smith@aanda.com   **Office Address**

Phone Number: 413-555-3456   **Street:** 123 Main Street

Fax Number: 413-555-7765   **City:** Springfield   **State:** MA   **Zip:** 01104

Associated Stores ▼

Performance	Project Type	Store Number [4]	Status	City	Company	Region	District	Area	Schedules Completion
View Review / Add Review [8]	Contracted	0859	Active	Agawam	CVS	16	11	11	01/19/2009
	Bid Solicited	1452	Postponed	Gaithersburg	CVS	16	11	11	06/30/2009
	Contracted	1087	Completed	Stony Point	CVS	16	11	11	01/15/2009
	Bid Submitted	4451	Canceled	Oceanside	CVS	16	11	11	03/15/2009

Communication ▼

Date	From	To	Type	Store	View [5]	Topic
09/10/2008	JBB	A & A	E-mail	00859	View	Please fill out bid packet online
09/20/2008	A & A	JBB	E-mail	00859	View	Completed bid packet submitted
11/10/2008	JBB	A & A	E-mail	01452	View	Please fill out bid packet online
01/22/2009	Joe Smith	Josie	Call Log	00859	View	Need access to store
02/12/2009	Josie	Joe Smith	E-mail	00859	View	Reminder: Complete sign-off checklist
02/16/2009	Josie	Joe Smith	Call Log	00859	View	Need to provide complete sign-off checklist

Finance ▼

Store Number	Type	Status	Contracted Amount	Payment Amount	Payment Type	Contract Payment Date	Actual Payment Date	Transaction Referecnce Number
00859	AR	Late	$7500.00			03/09/2009		
01087	AR	Completed	$10,000.00	$10,000.00	Wire Transfer	04/15/2009	04/10/2009	REF 349756

1.15. Vendor Details

1.15.1. Annotations

Footnote	Specification
1	Save and Clear button initially begin as inactive and will become active after the first edits are made to teh page.
2	->Confirm Save Lightbox State
3	->Clear Edits Lightbox State
4	->Store Details
5	->View Communication Type
6	Text fields for data are editable when double clicked. Text field becomes a textbox.
7	Average of all the Vendor Reviews left On Click ->Vendor Evaluation Summary
8	->Add Vendor Evaluation (for the associated Store) ->View Vendor Evaluation (for the associated store? Are there more than one evals per store?)

PROJECT MANAGEMENT SYSTEM

Welcome back,
jbb   [logout]

Search in Stores ▾ **for** [   ]   Go   **Log a Call**   **Help**

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add Document

*File to Upload: [enter text...]   Browse... `1`

Notes: [enter text...

            ]

Upload Document `2`

With Upload Error Message State

Upload Failed:
The file **Miscellaneous Report.pdf** was not saved in the system.
Please try again or contact support.

close message `3`

*File to Upload: [enter text...]   Browse...

Notes: [enter text...

            ]

Upload Document

JBB PROJECT MANAGEMENT SYSTEM

Welcome back, **jbb** [logout]

Search in Stores ▾ **for** [＿＿＿＿＿＿] [Go]   [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Add Document

Warning:
The file **Custrel Store Profile Report.xls** can be imported as a spreadsheet. Close this message to accept upload only.

Would you like to import the spreadsheet file instead?

[**Import Spreadsheet**] ⁵   close message ⁴

*File to Upload: [enter text...]   [Browse...]

Notes: [enter text...

]

[**Upload Document**]

1.16. Add Document

1.16.1. Annotations

Footnote	Specification
1	Open window to browse computer for a file to upload. Once selected place in File to Upload textbox.
2	Upload document to system library
3	Close the Error Message and slide all content up
4	Close the Spreadsheet Detected Message and slide all content up
5	Load the Import Data page and fill in the filename that was used for the upload.

JBB

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▼] for [_____] [Go]   [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Import Data

*Company: [Select a Company... ▼] [4]
*Spreadsheet Type: [Select a Type... ▼]
*File to Upload: [enter text...] [Browse...] [1]

[Import File] [5]

Imported Files to with Discrepancies to Reconcile [2]

Descrepancies	File Name [3]	Date Imported	Company	Spreadsheet Type
4	CVS Working Master.xls	5/10/2009	CVS	Store Profile
12	RiteAid Store Closure List 5-2-09.xls	5/7/2009	RiteAid	Store Closure List

---

With Confirmation Message State

JBB

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▼] for [_____] [Go]   [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Discrepancy Resolution Confirmation

Confirmation:
All discrepancies for **Custrel Store Profile Report.xls** have been resolved.   close message [6]

Import Spreadsheet File

*Company: [Select a Company... ▼]
*Spreadsheet Type: [Select a Type... ▼]
*File to Upload: [enter text...] [Browse...]

[Import File]

Imported Files to with Discrepancies to Reconcile

Descrepancies	File Name	Date Imported	Company	Spreadsheet Type
4	CVS Working Master.xls	5/10/2009	CVS	Store Profile
12	RiteAid Store Closure List 5-2-09.xls	5/7/2009	RiteAid	Store Closure List

JBB PROJECT MANAGEMENT SYSTEM

Welcome back,
jbb   [logout]

Search in [Stores ▼] for [_____]   [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Import Data

Upload Failed:
The file **Custrel Store Profile Report.xls** was not saved in the system.
Please try again or contact support.

close message [7]

Import Spreadsheet File

*__Company:__ [Select a Company... ▼]

*__Spreadsheet Type:__ [Select a Type... ▼]

*__File to Upload:__ [enter text...]   [Browse...]

[**Import File**]

Imported Files to with Discrepancies to Reconcile

Descrepancies	File Name	Date Imported	Company	Spreadsheet Type
4	CVS Working Master.xls	5/10/2009	CVS	Store Profile
12	RiteAid Store Closure List 5-2-09.xls	5/7/2009	RiteAid	Store Closure List

---

JBB PROJECT MANAGEMENT SYSTEM

Welcome back,
jbb   [logout]

Search in [Stores ▼] for [_____]   [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Import Data

File Not Imported:
The file **Custrel Store Profile Report.xls** cannot be imported.
The file may be corrupt or the formatting is incorrect.

Would you like to add the
file as a Document instead?

[**Add Document**] [9]   close message [8]

Import Spreadsheet File

*__Company:__ [Select a Company... ▼]

*__Spreadsheet Type:__ [Select a Type... ▼]

*__File to Upload:__ [enter text...]   [Browse...]

[**Import File**]

Imported Files to with Discrepancies to Reconcile

Descrepancies	File Name	Date Imported	Company	Spreadsheet Type
4	CVS Working Master.xls	5/10/2009	CVS	Store Profile
12	RiteAid Store Closure List 5-2-09.xls	5/7/2009	RiteAid	Store Closure List

1.17. Import Data

1.17.1. Annotations

Footnote	Specification
1	Open window to browse computer for a file to upload. Once selected place in File to Upload textbox.
2	All saved files that have been uploaded by the current user and have not been completely resolved
3	Download and view the document
4	-Albertsons -CVS -RiteAid -Walgreens
5	Upload document to system library and begin the reconcile process ->Reconcile Discrepancies Summary
6	Close the Confirmation Message and slide all content up
7	Close the Error Message and slide all content up
8	Close the File Not Imported Message and slide all content up
9	Load the Add Document page and fill in the filename that was used for the failed import.

JBB

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▾] **for** [＿＿＿＿＿＿] [Go]   [**Log a Call**] [**Help**]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Reconcile Import Discrepancies

Custrel Store Profile Report.xls successfully uploaded. [1]

View Custrel Store Profile Report.xls [2]

[3] **3** | **Descrepancies Found**

Company: CUSTREL
File Type: Store Profile Report

[**Interactive Mode**] [6]   [**Replace All**] [5]   [**Save for Later**] [4]

1.18. Reconcile Discrepancies Summary

1.18.1. Annotations

Footnote	Specification
1	Confirmation for successful upload
2	View the uploaded document.
3	Count of total number of descrepancies found
4	File will be saved for future resolution and will appear in list on... -> Import Data
5	Automatically accept all discrepancies ->Discrepancy Resolution Summary
6	Begin process of looking at each discrepancy. ->Discrepancy Deny/Replace

PROJECT MANAGEMENT SYSTEM

Search in [Stores ▼] **for** [_____] [Go]   [Log a Call] [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Reconcile Import Discrepancies

Custrel Store Profile Report.xls Discrepancy Resolution

Location: Major Region for Store Number 0282 [6]

3 Descrepancies Left [3]

Old Data

> Hawaii

New Data

> Northeast

[**Save and Exit**] [5]

Save unresolved descrepancies for later

[**Deny**] [2]

Keep data from previous file and record reason

[**Skip**] [4]

Resolve later and move to next discrepancy

[**Replace**] [1]

Replace use the data from recently imported file

1.19. Discrepancy Deny/Replace

1.19.1. Annotations

Footnote	Specification
1	
2	Popup light box asking for reason for deny
3	Counter that decrements when discrepancy is either accepted or denied
4	Move to next discrepancy
5	Saves Reconcile process in current state and saves file to list on... ->Import Data
6	Location of the discrepancy in the document

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| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Discrepancy Resolution Summary

Custrel Store Profile Report.xls

No more discrepancies detected

Accepted Discrepancies

	Previous Data	Imported Data	Column	Store #
Change	Hawaii	Northeast	Major Region	282
Change	pomagno@cvs.com	sawasikowski@cvs.com	Area Mgr Email	394

Denied Discrepancies

	Previous Data	Imported Data	Column	Store #	Reason
Change	No	Yes	Photo Flag	282	New Confirmed Mistake

| Complete Resolution | | Disgard Resolutions |

1.20. Discrepancy Resolution Summary

1.20.1. Annotations

Footnote	Specification
1	->Import Data and file saved added to list
2	The kept data is highlighted
3	Change will move the discrepancy to the other table. Accepted to Denied will popup a lightbox asking for a reason.
4	->Import Data with a confirmation message

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Search in [Stores ▼] for [＿＿＿＿＿＿]   [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Notification Settings

✂ **When** [new store added ▼]   **notify** [JBB project manager ▼] **on** [immediately ▼]

✂ **When** [new contact added ▼]   **notify** [JBB project manager ▼] **on** [immediately ▼]

✂ **When** [new contact added ▼]   **notify** [JBB business manager ▼] **on** [immediately ▼]

Add a new notification rule...

[Save Settings]   [Cancel]

1.21. Notification Settings

1.21.1. Annotations

Footnote	Specification
1	Adds a new rule to bottom of the list
2	Select When a rule will be invoked - New Store Added - New Contact Added - New Task Added - Store Information Changed - Contact Information Changed - Task Changed - Tasks Past Due - Milestone Reminder
3	Specifiy which roles are to be notified when rule occurs - JBB Project Manager - JBB Business Manager - Client Store Manager - Client District Manager - Client District Healthcare Manager - Client Area Manager - Client Regional Manager - Vendor Business Manager - Vendor Project Manager - Assigned Owner
4	Specify time frame to notifiy - 1 to 7 days before or after occurence
5	Save settings, Standard Saving lightbox sequence

JBB

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Welcome back, **jbb**   [logout]

Search in [Stores ▾] for [Agawam] [3]   [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Store Search Results [4]

You searched in **Stores** for: **Agawam** [1]

Status	Store Number [2]	Company	Region	District	Area	Store Type	City	Scheduled Completion	Lease End Date
Active	0859	CVS	16	11	11	Freestanding	Agawam	1/19/09	03/09/09

1.22. Search Results

1.22.1. Annotations

Footnote	Specification
1	State the search used to obtain current search results
2	->Store Details
3	Search terms in searchbox for easy alteration of next search or changing of facet
4	Different format of search results table for each different format

Incoming call from: Dave Fazzino

Answer

Forward to Voicemail

Transfer

1.23. Incoming Call Pop

1.23.1. Annotations

Footnote	Specification
1	Popup notification that occurs on any page when a call is received by the system.
2	Open contact details of the person calling in a new window (to not interupt current task) ->Contact Details If not in the system, remain on current page
3	Sends sirectly to voicemail
4	Selection of transfer recipient. Yet to be defined.

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Search in [Stores ▾] **for** [   ] [Go]   [Log a Call]   [Help]

| Dashboard | Stores | Contacts | Tasks | Reports | Documents | Communication | Settings |

Log Current Call

Time: 11:45am [1]   **Caller:** Dave Fazzino

Date: May 26, 2009   **Answered by:** JBB

Reason for Call	Store	Resolved? [3]	Deadline	Owner
Choose a Reason... ▾	Choose a Store... ▾	☐		

[2] Add a new topic...

[**Done with Call**] [4]

1.24. Log a Call

1.24.1. Annotations

Footnote	Specification
1	Information Pre-filled if accessed by Log a Call button used while on a call using the system
2	*Add another Reason for call to list
3	Resolved will not create a task
4	*Close current window