

190315 Switchable elements

Version Control					
Version	0.9	Release Date	Mar. 2019	Authorized by	Incomplete
<ul style="list-style-type: none">OUTSTANDING TASK: TB's tickets on disabling pricing need to be incorporated: https://polyhq.atlassian.net/browse/UF-433 https://polyhq.atlassian.net/browse/UF-434					

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SUMMARY

uFlexi offers an array of tools. Realistically, many of our agencies won't need them all. For each agency, we want to be able to conceal entire pages, and elements on other pages.

We are getting diverse requests to turn aspects of the system on or off for a particular agency. Rather than creating multiple ad-hoc fixes, we aim to create a structured menu of ala-carte options for each agency.

For usability, it makes sense to see the system as having a core function (intaking hours of availability of sellers, then outputting them). To that, we can switch on additional functionality.

Our aim is to avoid clustering functionality into packages that are turned on or off en-masse. We want granularity. Each agency decides if it needs their sellers to have documents functionality for instance, that decision is not linked to any other aspect of the system.

But options for switching need to be arranged in a hierarchy. For example: it's only if you have timesheets switched on for your Agency that uFlexi needs to know if you want the facility to include expenses on timesheets. The hierarchy needs to incorporate existing switches already available on `backofficeEditAgency` or `agencyControlsSave`.

We don't need any complex business rules about missing fields. If a field is to be concealed it is made non-mandatory and stored as empty. If an agency populates some fields that are then switched off, the inputs remain in the database but are not displayed so can't be altered. This should make the project as simple as possible.

Very occasionally, we need to insert a low-level rule to keep system behaviour coherent. For example, assume an agency doesn't want to see our contracts. uFlexi needs to auto-apply and confirm a contract for each buyer or seller to ensure they can be set to APPROVED status.

Switching off functionality that an agency's users take for granted would be disruptive. So, the menu of options is only accessible by a BO Manager or Superuser. Frontline BO users can only view the settings for an agency, not change them.

We need to ensure tabs/pages/screen elements that are hidden by a switch can't be accessed even by someone with knowledge of our URL's or layouts.

New hierarchy of switchable functionality that can be applied to Agency

Yellow shading signifies: Switch already exist (current location/label in right hand column).

	Element that can be switched	Element dependent on switch above at "Yes"	Visual impact if at No	Dbase impact if at No	Notes on the control
GENERAL					
1.	Userway		Userway icon not displayed on each page	None	backofficeEditAgency: "Enable Userway"
2.	Allow bookings		agencyHome/buyerHome: Make a Booking button hidden Agency/Buyer/Seller: Bookings accordions and reports hidden for all		
3.		Administrator bookings			backofficeEditAgency: "Administrator bookings".
4.	Timesheets		All home pages: Timesheets accordions hidden All main menus: Timesheet icon hidden All reports menus: Timesheets tabs hidden	If No: Bookings automatically have timesheets approved and marked as "Sent for Processing" so there are no overdue timesheets generating alerts etc.	App: Timesheet section + links off booking page hidden

			buyerPurchaseDetails + sellerJobView: TBC : Timesheet link hidden		
5.		Buyer feedback	SWITCH ALREADY EXISTS		backofficeEditAgency: "Timesheet client comments"
6.		Expenses			agencyControlsEdit: "Expenses"
7.		"Accepted" Status	We never show a timesheet as "Completed" after it has been approved by Buyer and Seller	There is no status of "Completed", it goes straight to "Accepted".	This is for agencies who don't need to review timesheets before they go to processing. We need to be sure Agency can still sign off timesheet for either or both parties directly.
8.	Contracts		All SideNavs: Contract tabS hidden Timesheets: Link to "Contract at time of booking" removed. agencyBuyerCoreDetailsEdit + agencySellerDetailsEdit: hide Contract section in entirety. Timesheet: link to contract at bottom of screen hidden	The top contract in the appropriate list is approved for the lower entity when the entity is created. (This allows Status to be set at APPROVED as normal.) There is currently a rule on agencySellerDetailsEdit that "all SideNav pages must be viewed before a new seller	

				can be approved". This might be removed. If it is not, it needs to be deactivated if this setting is set at No.	
9.	Remuneration types	THIS CONTROL IS FIXED AT "PAID"			backofficeEditAgency: "Remuneration types"
BUYER					
10.	Buyer: all fields?		Only fields in Table B below are displayed as input/output fields.	Other fields are non-mandatory and default to empty. Any content already in those fields becomes inaccessible.	
11.	Allow self-registration?				backofficeEditAgency: "Allow client self registraiotn"
12.	Auto-approve Buyers?	THIS BOX MUST DEFAULT TO NOT TICKED			backofficeEditAgency: "Auto-approve cleints"
13.	Buyer users		"Users" tab disappears for Buyer. agencyBuyerAdd: Bottom section disappears.	When buyer is created, a default first user is populated called "All users". Email address plus password are non mandatory and not stored.	We need to ensure these "All users" users can never log-in. (They are bypassed by Agency acting as.)

14.	Budgets		<p>PurchaseBuid: Budget accordion does not appear</p> <p>buyerSideNav: Budgets tab hidden</p> <p>buyerHome: Budgets accordion hidden</p>	<p>Any existing budgets for this agency's buyers are set at Inactive.</p> <p>Buyer gains one default budget with no spending controls.</p>	
15.	Hourly rate display		<p>PurchaseBuild: No display of rate</p> <p>Reports screens for Bookings and Timesheets: no display of rate</p>	<p>System uses default data to calculate rates and doesn't display them.</p>	<p>agencyControlsEdit: "Pricing display"</p>
16.	Buyer ratings		<p>Buyer SideNav: "[NAME OF BUYER] ratings" hidden</p> <p>sellerBuyerDetails: "Rating" section of each summary table removed.</p> <p>PurchaseBuild: ratings column hidden</p>	<p>None. No ratings are stored by default.</p>	
17.	Documents		<p>Drop down of options</p>		<p>backofficeEditAgency: "Client document access"</p>

SELLER

18.	Seller: all fields?		Only fields in Table C below are displayed as input/output fields.	<p>Universal birthdate applied to sellers. It should be clearly not intended to ever display (eg 1st Jan 1900).</p> <p>There is currently a rule on agencySellerDetailsEdit that “all SideNav pages must be viewed before a new seller can be approved”. This might be removed. If it is not, it needs to be deactivated if this setting is set at No.</p>	Our contract with agency will make it their responsibility to ensure sellers are adult.
19.		Seller categorization data	agencySellerPersonalDetailsEdit: the section from “Nationality” to “Languages” is hidden.	No entries in dbase for those fields	Corresponding reports columns to be removed
20.	Unapproved worker abilities	THIS BOX DEFAULTS TO NOT TICKED			backofficeEditAgency: “Unapproved worker abilities”
21.	Weekly hours ceiling				agencyControlsEdit: “Ceiling for maximum weekly hours”
22.	Seller: Auto-offer roles				agencyControlsEdit: “Management of roles applied to workers”

23.	Seller rank		<p>agencySellerDetailsEdit: “Reliability Rank” input box hidden plus the two links to its right</p> <p>sellerJobHistoryView: Bottom section (“My Reliability Rank History”) hidden</p> <p>PurchaseBuild: Rank column hidden</p>		TBC SWITCH EXISTS AND NEEDS TESTING: not possible at time of writing (crashing of Agency Features page)
24.	Seller Bank Details			Before a new seller can be approved, Agency has to visit every page on the SideNav. This must only include pages that are displayed. If any of these pages are hidden for agency, they need to be excluded from the “must view before approving” rule.	backofficeEditAgency: “Enable seller bank details”
25.	Seller References				backofficeEditAgency: “Enable seller references”
26.	Hourly rate display		<p>SWITCH ALREADY EXISTS?</p> <p>sellerBuyers: “My Rate” column hidden</p> <p>sellerBuyerDetails: “Rating” column in each summary table hidden.</p>		<p>agencyControlsEdit: “Pricing display”</p> <p>SWITCH NEEDS TESTING: not possible at time of writing (crashing of Agency Features page)</p>

27.		My Terms	Seller SideNav: "My Terms" tab hidden.	Default entries used. Calculations can run but are never displayed.	Sellers can only work off fixed rate roles or are limited to default hourly rate set by BO
28.		<ul style="list-style-type: none"> Advanced options 	SWITCH ALREADY EXISTS		agencyControlsEdit: "Worker parameter controls"?
29.		Price against buyers	sellerBuyers: user is unable to add a fixed price		
30.	Working Time Controls		AgencySideNav: "Working Time Restrictions" hidden Agency Manage Seller SideNav: "Working Time Restrictions" hidden	When this functionality is switched to Off, system must check if there are any working time restrictions in force. If so, it puts up alert "You have working time restrictions applied to[SELLER]s. They must be removed before you can switch this functionality off"	
31.	Documents		Drop down of options		backofficeEditAgency: "Worker document access"

TABLE B: Core fields for Buyer
Name / Abbreviated name
Reference
STATUS
Verifications
Roles
Location(s)/Reporting Instructions

TABLE C: Core fields for Seller
Name
Refence
STATUS
Location
Cell number
Verifications
Roles
Availability

Setting up the switches

The hierarchy of switches in the main table above needs to be built into backofficeEditAgency or, better still, a new page for BO "Agency functionality". That will ideally incorporate existing switches.

Some of the existing switches are currently on agencyControlsSave, a page only BO can access (by Acting as Agency). Ideally, we would like to bring all those controls onto agencyControlsSave or a new page.

By default, all switches should be on (ie boxes ticked for "Yes") until they are unticked. There are some exceptions listed in the table above, boxes that must be unticked by default.

Only BO Managers or Superusers can change the settings in Agency's hierarchy of functionality. BO Frontline users can view the settings but not amend them.