

CASF Screen Design v.2
Presented On: 2/14/2017

The following pages represent the initial set of screens related to the CASF application, which Estrada, CPUC IT and the CASF Business Team will work to finalize in an effort to complete the comprehensive CASF Application. The screens presented in this document are the foundation for the following purposes; New Application Creation as well as Project Data, Notes and Contacts Data Entry.

This document has been provided to formalize the communication with respect to the first set of screens to be approved and delivered.

Estrada plans to perform weekly design sessions to capture all formatting and business rule requirements that will be used to complete the specific pages. Once this set of screens has been vetted and have been developed to include the specific design requirements, Estrada will require these screens be approved before moving to additional screens.

The second set of screens will include an additional four screens. This set will focus on the Main Landing Page, Status, Project Files and Extended Data. The final design elements will focus on reporting and administration of the various system dictionaries.

Global Feature Feedback from Meeting on February 14, 2017.

If user is working in an edit screen and attempts to close the browser, the specific tab or change the URL for the current session a warning should pop up that the user must save the changes or cancel before moving away from the screen. Kimmie to provide this warning. Sai to research how this can be done and get back to the team with what is possible with respect to this request.

Nice to have features discussed:

Bill asked the team to track the request to have a way to manage other files associated with the the CASF project application. He was interested in keeping .msg files for example along with the other application files provided by the applicant throughout the application review process.

2. New Application Creation Screen

The Application Creation Screen will provide the CASF applicant the ability to generate the initial record and define high level specifics related to the CASF project application. The result of completing this screen by the applicant is the generation of a unique Application ID, the primary contact for the application and a permanent record the applicant can use to complete the application process.

Business User: Internal_A_1 Log out

Welcome to eFAST My Applications Manage My Account Company Registration Requests eFAST Administration

Create New Application

Project Data Initial

* ProjectSummary CpcnNum **Not needed**
* ProjectTitle * CpcnProofYn Yes No * FrnNum * CeqaProposedYn Yes No
* ProjectName WirNum **Put Org Type here?**

Insert check radio button - Not a Telecommunications Carrier or Reseller

Primary Contact

* CntFirstName * CntEmail * CntCity
* CntLastName CntAltEmail * CntStateCode
* CntTitle CntFax * CntZipCode
CntPhone * CntAddressLine1
CntAltPhone CntAddressLine2

Save Cancel

cpuc 1/9/2017 DRAFT sai

Current Projects

Note – Should not this screen go before the Project Data Screen?

CASF New Application Creation Screen

At the time of writing this document additional design details have been proposed to better capture the various identifiers the applicant may supply to allow CPUC to understand the context of the company with respect to the project application. This proposed design that would replace the upper portion of the screen shown above is shown below.

The image shows a screenshot of a form section that has been crossed out with a large red X. The form is divided into two main sections:

- CPCN Requirement**
 - I am a Telephone Corporation
 - CPCN Number
 - I Have proof of CPCN Filing (No Current CPCN)
- Non-Telephone Corporation Identifier**
 - U Number
 - WIP Number
 - NDIEC Number

Don't think this is totally correct – just add in check radio button as shown in previous screen – 'Not a Telecommunications Carrier or Reseller'

1. Project Data Screen

This screen is designed to capture the bulk of the data an applicant will submit when requesting finds for a new project. This screen will look the same whether you are the applicant or a CPUC employee reviewing the application. It has been developed to include the applicable data elements, the order of each data element and groupings as defined by the CASF business team.

Welcome to eFAST | **My Applications** | Manage My Account | Company Registration Requests | eFAST Administration

Business User: **Internal_A_1** Log out

CASF | CTF | Add Application Access

Application Management | Project Name: project name 7 | Application Status: DRAFT | **Back**

Project Data | Project Files | Contacts | Finalize | Notes | Status | Extended Data | Scoring | Manage Dictionary

Project Data | **Save**

* ProjectName: project name 7

* ProjectSummary: project summary 7 New addition | **View**

Would this be pre-populated from the initial application input screen?

CpcnNum: | WirNum: | FrnNum: | * OrgTypeKey: CLEC

* ProjectArea: Project Area | PriorityArea: | * FundTypeKey: Grant

ActInstallFee: | MonthResFee: | *This should be with the project files under project*

Money Requested

What does the asterisk indicate?

* Grant Requested

Contribution in Aid of Construction

Loan Requested

Applicant Match

Project Funds Requested (Grant or Loan)

* Total Project Budget

Project

* Project Type

* Service Type

Project Square Miles

Number of Households in Project Area

Estimated number of potential broadband subscribers

Estimated number of potential broadband households

Basis for Estimated potential subscriber size

* Proposed Technology Type

MaxDownSpeed

MaxUpSpeed

Estimated potential subscriber adoption plan

Proposed Voice Service (if applicable)

Proposed Pricing: Monthly Residential Fee

Proposed Pricing: Monthly Residential Fee incl/voice

Proposed Pricing: High Tier Residential Fees

Proposed Pricing: Small Business Fee

Proposed Pricing: Additional Comments

Price commitment period



Project Location

Assertion that area being proposed is Unserved or Underserved

Current Broadband Infrastructure (within 5 miles of proposed project)

Location

The boxes below are narrative – are these supposed to be expandable?

Add Delete

View ▾  Detach

County Name	Status
SACRAMENTO	Yes

CBZ List

Add Delete

View ▾  Detach

Cbg	Househ	MedianInc	AvgUpSpeedKey	AvgDownSpeedKey	NumOfSubscr	CbgType	UnUnderServed	UpSpeedKey	DownSpeedKey
No data to display.									

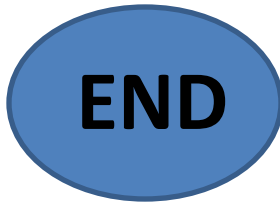
The entries above and below are not by CBG but for the project – also not sure what CBG and ZIP Code Types are.

Zip Codes List

Add Delete

View ▾  Detach

ZipCode	Househ	MedianInc	AvgUpSpeedKey	AvgDownSpeedKey	NumOfSubscr	ZipCodeType	UnUnderServed	UpSpeedKey	DownSpeedKey
90503			Greater than 20...	Greater than 20...		Current	UNSERVED		



Application Notes Screen


The application notes screen will display all notes that have been written in the context of the specific application. All notes will be reviewed and added in this screen. Notes can also be sent via email using the send feature.

Project Data Project Files Contacts Finalize **Notes** Status Extended Data Scoring Manage Dictionary

Notes

Add Save Send Cancel

* AppNoteTypeKey INITIAL REVIEW ▾

* NoteDatetime 1/11/2017 

* IntOnlyYn Yes ▾

* ConfidYn Yes ▾

* Note first notes

* NoteByKey sai

Notes History

View ▾  Detach

AppNoteTypeKey	NoteDatetime	Note	NoteByKey	IntOnlyYn	ConfidYn	AppStatKey
INITIAL REVIEW	1/11/2017	first notes	sai	Yes	Yes	DRAFT
INITIAL REVIEW	1/11/2017	second notes modified	sai	Yes	No	DRAFT

I thought the notes detail was going to the bottom of the screen? As we discussed, I do not see a SEND button as being very functional given the limitations of the system.

Feedback from Meeting on February 14, 2017.

1. Move notes detail grid to top of screen and limit to 5 records at a time (paginate)
2. Add ability to sort grid columns
3. Expand Notes control in detail section.
4. Add ability to show the entire note in a pop-up to view large notes more easily.
5. Remove Save button at top of screen
6. Remove Cancel button at top of screen
7. Add button should bring up a pop up screen; within pop up include Save and Cancel buttons. Save should be disabled until something has been entered into screen. Cancel will warn user that there is unsaved data. Kimmie to provide wording for this warning.

Decisions:

1. No ability to edit or delete notes once saved.
2. Pending – Include manual Send functionality in as a priority or nice to have feature.
 - a) If decided to keep must still test if mail can be sent from distribution list in order for the From data to be correctly populated. The feature would require an additional screen to request To:, Subject:, Message: Note itself, and Submit button. Emails sent outside of CASF would not be captured in this system unless copied and pasted to a new note with a note type of email.

Application Contacts Screen

The application contacts screen will display all the contacts for the company who is applying for the specific CASF project funds. The primary contact will be defined by the applicant who initially created the application record. Additional contacts can be added by the features provided within this screen. Company and CPUC users will be able to view and modify this data.

Project Data Project Files **Contacts** Finalize Notes Status Extended Data Scoring Manage Dictionary

Contact Management

Add Cancel Save

* CntType Primary

* CntEmail sai

* CntFirstName sai

CntAltEmail

* CntLastName logishetty

* CntTitle adf

* CntAddressLine1 sfo

CntPhone 123456

CntAddressLine2

CntAltPhone

* CntCity sfo

CntFax

* CntStateCode ca


* CntZipCode 90503

OK

Feedback from Meeting on February 14, 2017.

1. Remove Detail section
2. Move grid to top of screen.
3. Add ability to sort grid columns
4. Add Edit button to edit highlighted row in contact grid.
5. Remove Save and Cancel from top of screen.
6. New Edit button would bring up pop up screen with contact details.
7. Pop Up for edit would include Save and Cancel buttons. Save would be disabled until something has changed on the screen. The cancel button would close screen and only warn user if there is unsaved data. Kimmie to provide the wording for this warning message.

Contacts List

View ▾  Detach

CntType	CntFirstName	CntLastName	CntAddressLine1	CntAddressLine2	CntCity	CntStateCode	CntZipCode	CntTitle	C
Primary	sai	logishetty	sfo		sfo	ca	90503	adf	1.
Secondary	Vivek	G	Sfo		sfo	ca	90503	soa	