Central Processing

The central processing app will be like Central Casting for Technology.

Roles

The roles for Central Processing will match the roles on the Company Overview page with the addition of an admin and client role

Admin

The admin role will be given to members for the Gunner Technology executive team only. The admin role will enable the user to approve, reject and modify memberships and approve projects.

How it works

Guest

A guest would be someone who is not logged in.

When they try to browse to any URL of the site, they will be redirected to a splash page that has Gunner Technology promo information with links to two pages

- Form for requesting access to Central Processing.
- Form for requesting a quote on a project.

This Central Processing form will request the following information:

- Individual
  - First Name
  - Last Name
- Company
  - Name
- Role(s) applying for (Designer, Content Specialist, Marketer, Project Manager, Business Development, Project Manager, Developer or Producer)
- URLs for work samples and Resume purposes
  - GitHub
  - LinkedIn
  - Dribble
  - Forrst
  - Website/Blog
- Availability in hours per week
- Rate (for each role)
  - Hourly: Developer, Designer, Producer, Marketer, Content Specialist)
  - Per Article: Content Specialist
  - Logo (with two revisions): Designer
- Email address
- Primary Phone
- Secondary Phone
- Address
- Skill Level (for each role: Jr/Sr)
- Dropbox URL
- Skype Name
- Heroku username/email
- Engine Yard username/email

TODO What other information would we need from them?

Submitting this form will:

- Create an entry in the database for a new user with an "applicant" role, awaiting approval
- Send an email to the GT executive team, alerting them to a new membership request

Any member of the executive team can approve the application or deny it.

A denial will remove the applicant role and add the "denied" role and send the applicant a boilerplate email.

The approval gets off a series of actions.

Manual

The person doing the approval will need to manually do the following things:

- Create a Redmine Account for the user and add that username to the Profile
- Create a Google Apps Account for the user and add the email address to the Profile
- Adds applicant to appropriate distribution lists
- Create a Gunner Technology Blog account for the user

Automatic

- The applicant role will be removed
- The roles applied for and approved will be added. It would be possible, for example, for an applicant to apply as a designer and developer and only be approved as a designer
- A redmine account is created for the user, given access to the global Gunner Technology project
- An email is sent to the user, this email includes:
  - Boilerplate "Welcome" text
  - Redmine credentials
  - Links to appropriate "Getting Started" pages based on roles. The getting started pages would include stuff like credentials for applications we use, processes and procedures we follow, etc
  - Affiliate Code/Link: This link can be added to any website or emailed. It links to GT's prospect info page. If a prospect converts after clicking this link, that member gets the referral bonus.
    - TODO: What else?
  - The appropriate form that needs to be filled out for the applicant to be paid
    - MSA + W2? for companies???? TODO: Verify this
    - 1099 for individuals???? TODO: Verify this

Read on for information on the project quote form.

Member

Once an application has been approved, the applicant will have access to Central Processing. Different roles will have varying levels of access, but in application will consist of the following components

Projects

TODO: Should we keep this simple or try to make it into a mini CRM-like sales funnel (stage, % close chance, estimated close date, estimated value, etc)?

The project component will be simple RESTful CRUD

Index

The index page will be a searchable listing of projects. Search criteria include

- Budget (Admins only)
- Division (Web Design, Internet Marketing or Technology)
- Team members (Members can say, show me only projects with Cody Swann as a member)
- Status (Pitched, Approved, Staffed, In Progress, Completed)
- Date Range
- Roles Needed (Show me only projects that need a Project Manager)
- Payment Plan (Hourly, Project, Retainer)
- Payment range (In conjunction with option above, "Show me all projects, paying an hourly rate between 35 and 75 dollars per hour")
- Title
- Source (Who was the referral/close source. Admins only)
- TODO: Anything else?

New

This page will be primarily used by Admins and Business Developers, but guests looking for a quote can fill out this form, too.

It will ask for the information available as search/filter criteria.

If an admin is creating the new project, the form also will ask for suggested team members.

When the form is submitted, it will update the record and send an email.

If suggested team members are present, the email will go to those members only.

If suggested team members are absent, the email will go to distribution lists corresponding to the roles needed for the project.

For example, a project that needs a project manager and developer project is created. The admin suggests a project manager, but not a developer. In this case, an email would go to the suggested project manager and the developers distribution list.

The email will contain a link to the project detail page.

Additional fields include:

- Title
- Description
- Division (Design, Technology, Marketing)
- If admin/biz dev
  - Estimated Start Date
  - Referral Source
  - Referral Type (Simple, Close)
  - Deadline (optional)
  - Payment preference (Hourly, Per Article, Project, Retainer)
  - Budget (optional)
  - File uploads (for PDFs/Word Docs)
  - Client (From drop down)
- If guest
  - Sub-form requiring client info

Show

The details page of the project will include basically the information available as search/filter criteria plus a link to the Redmine project page if it's reached the "Approved" status.

If the member viewing the project has been tagged as suggested, they will be asked if they want to approve the invitation. If they do, they'll be added to the team.

If a non-invited member views the project detailed page and has a role that has not been staffed, they will have the option to request to be a team member for that project. If they have more than one role that is open for the project, they will be asked to select which role they are requesting to join for.

Such a request will send an email to the appropriate executive member, who can follow the link back to the page. Once there, the executive member will see a list of outstanding requests and be able to accept or deny them. Each action will send an email to the project applicant.

Once all the projects roles have been filled, its status will change from "Approved" to "Staffed."

Edit

This project will be available to Admins and Business Development only.

It will be identical to the New page, but with existing information pre-populated.

Profiles

Each member, whether a company or an individual, will have a simple profile page, mainly to show what projects they're involved with, they're availably and supplemental information in the form of links.

Index

Much like the project index, the profile index will act as search/filter for members and admins to shift through.

Search/Filter criteria includes:

- Last Name
- Company Name
- Only companies
- Only individuals
- Preferred payment method (hourly, project, per article, retainer)
- Roles
- Skills
- Level (in role: Jr/Sr)
- Availability
- Preferred payment rate
- Time as a member (show me all members who have been with Gunner Technology more than a year)

- Rating (Admin only: Show me all members rated a 9 (out of 10) or higher)

New

This will be available to admins only and will be used to manually add members as opposed to require them to sign up via the normal process.

Show

Shows all the information from the Search/Filter section and additionally includes their project history.

Edit

Available to admins and the profile owner (ie, I can edit my own profile)

Only admins will be able to change the rating.

Clients

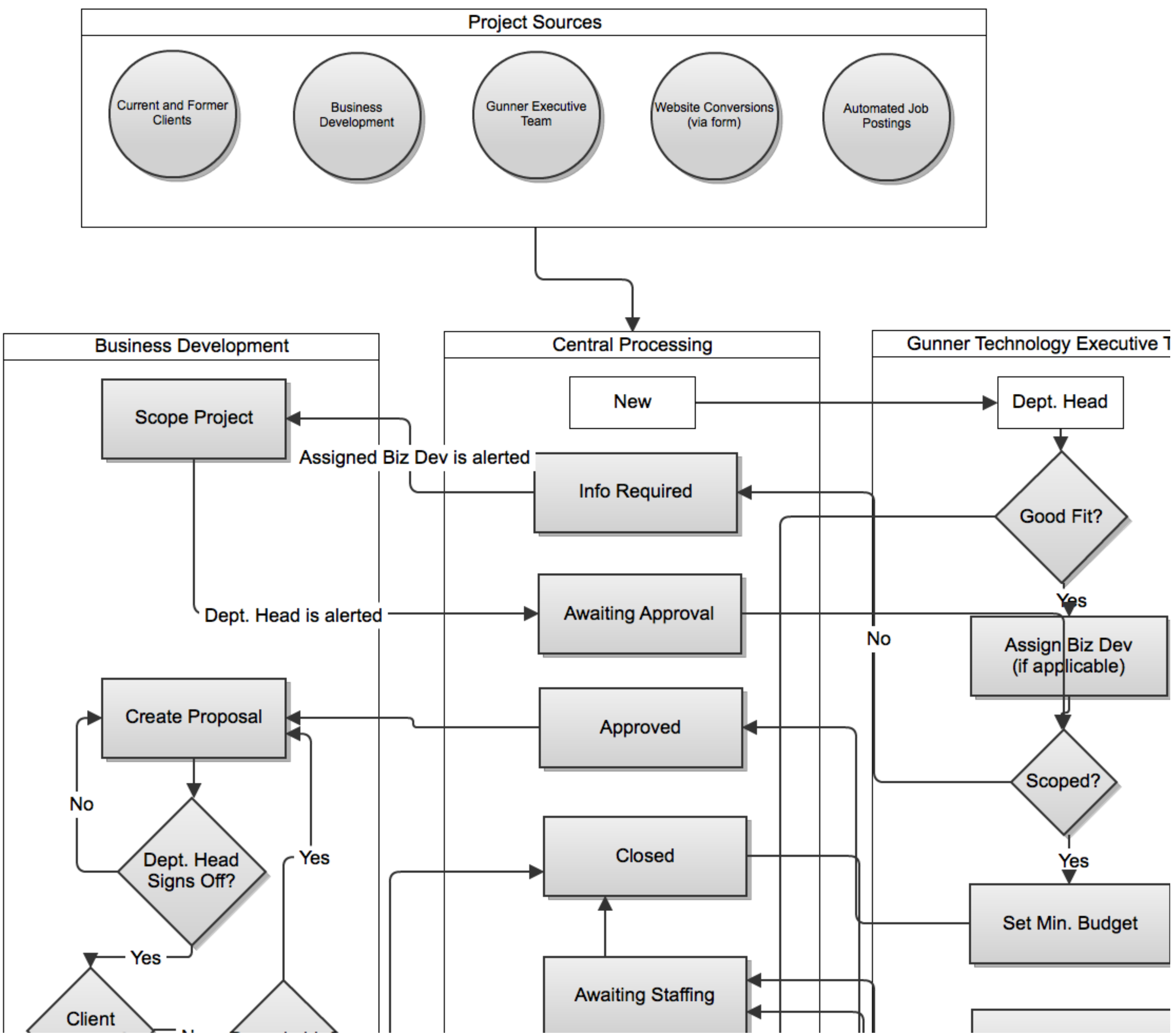
Very simple RESTful CRUD component for adding clients - mainly so they can be associated with projects.

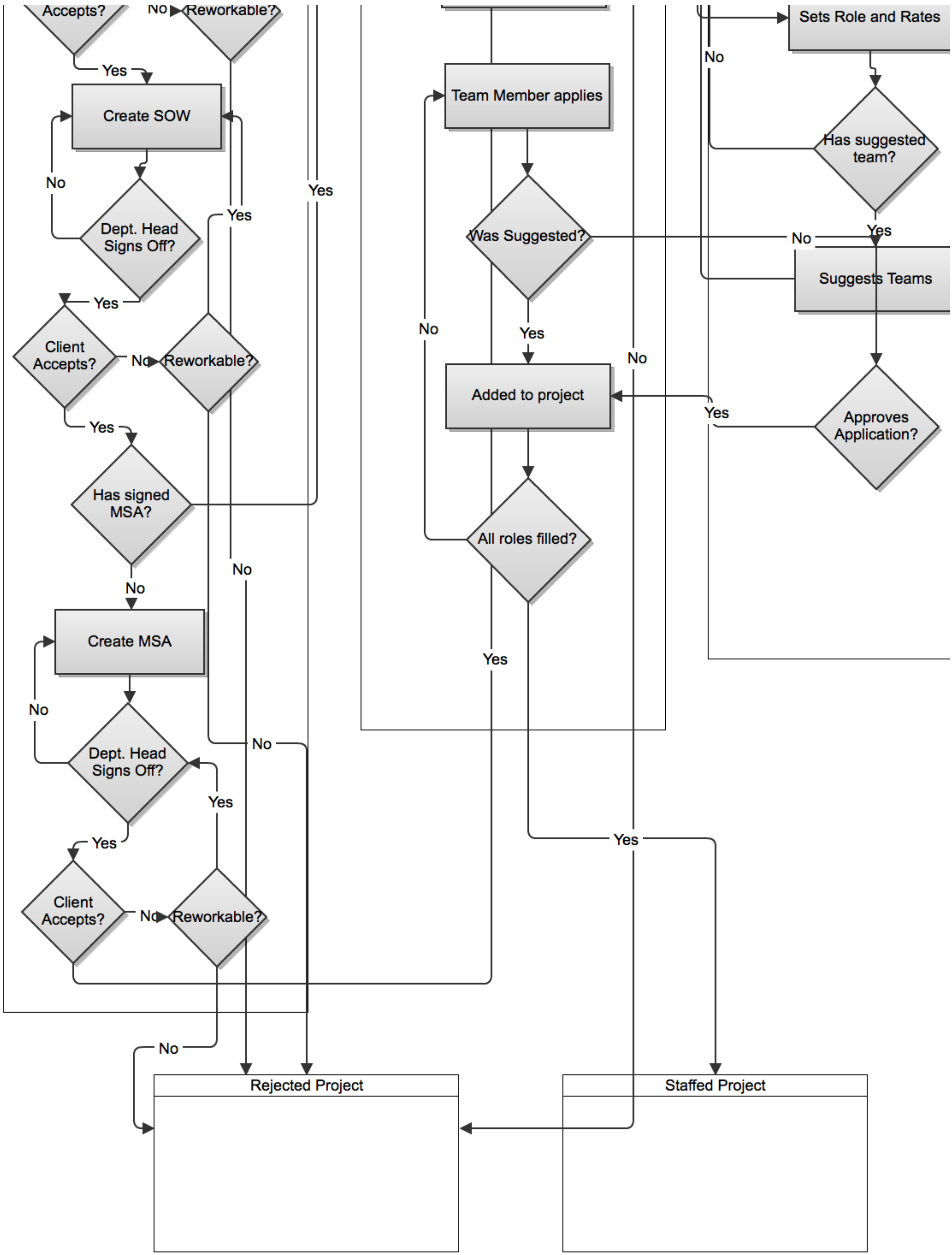
Only admins and business development will have access to any of pieces of this component.

Information includes:

- Name
- Primary Contact's Name
- Contact methods: Probably just a serialized array of hashes like this [{:method => 'email', :value => 'cody@gunnertech.com'}, {:method => 'phone', :value => '860.940.4747'}]

Diagram




Accepts?
No
Reworkable?
Yes
Create SOW
No
Dept. Head
Signs Off?
Yes
Yes
Client
Accepts?
No
Reworkable?
Yes
Yes
Has signed
MSA?
No
No
Create MSA
No
Dept. Head
Signs Off?
Yes
Yes
Client
Accepts?
No
Reworkable?
No
No
Team Member applies
Was Suggested?
No
Yes
Added to project
All roles filled?
Yes
Yes
No
Sets Role and Rates
No
Has suggested
team?
Yes
No
Suggests Teams
Yes
Approves
Application?
Rejected Project
Staffed Project

Central_Processing.png (186.8 kB) Cody Swann, 09/04/2011 08:38 am