

savant

FILE NAME RMS_v1.5.graffle

EDITED ON Mon Mar 17 2014

MODIFICATION DATE	VERSION	Edited by	DESCRIPTION
Mon. Feb. 24, 2013	1.0	Dean Wong	Initial design concept
Mon. Feb. 26, 2013	1.1	Dean Wong	Top level and 2nd rev. based on dev feedback
Mon. Feb. 26, 2013	1.2	Dean Wong	Rework to try to resolve navigation and simplify sections; Syncing design with current EMS attributes
Mon. Mar. 3, 2013	1.3	Dean Wong	3rd review w/Andy, Art feedback to update concept's main nav, branding, task flows for invites and managing my people.
Mon. Mar. 5, 2013	1.4	Dean Wong	4th round: Reworked nav and search back to more app-like vs. web-site; simplify editing to be non-drag-n-drop; Go to single group creating; Remove avatar mgt. from admin.
Mon. Mar. 17, 2013	1.5	Dean Wong	Updated editing to live mode for consistency with system monitor redesign group editing method; Updated subheader styling on the default home page to denote RMS; Proposed footer navigation and styling suggestion before handoff to visual design.

Overview - Dashboard Grid View

- The Dashboard defaults to a grid view of all systems to which the logged in user has access.
- Hover over a chicklet to show at-a-glance system information.
- Click on a chicklet to drill down to full details of that system. Customer invites and "people" (e.g. The Dealer, their employees, any 3rd parties) are managed at the detailed system level.
- (1) Level of grouping. New groups are created at the top level and there is no inheritance or nesting.
- To edit a group, a modal window is displayed allowing the user to multi-select one or more systems to move to a group.

- Navigate to Systems or People (Employees or Dealer subcontractors)
- Search quickly for a system or user
- Filter by status
- Grid or List page display options
- Creates a new top level group. Groups appear in alpha-order, with the exception of unassigned (systems that have been binded but not organizationally grouped).
- Salesforce's dealer company name and page subheading
- Singular and multi-select editing of one or more systems will be done "live" with no transitional editing mode. Scroll bars may need to display for lengthy vertical displays of source systems/groups. On saving, a brief confirmation message should be displayed (e.g. Centered on-screen modal, 3-5 seconds before fading out) confirming the action.
- Popover on hover reveals some at-a-glance system details same as EMS.
- Groups can be renamed by double clicking to expose an in-line editable input field. Double tap activates the editable field; Single tap outside of the region saves.

The screenshot shows the main dashboard interface. At the top, there's a header with the Savant Logo, user name 'Mark Breslin's Account', and a 'Logout' link. Below the header, the page title is '%Company Name%' followed by 'All Systems' and 'Savant Residential Management System'. There are tabs for 'All Systems' and 'Manage My People', and a search bar with the placeholder 'Start typing to search for a system'. A status legend shows 'Good' (green), 'Warning' (yellow), and 'Failure' (red). A '+ New Group' button is visible. The main content area is divided into sections: 'Unassigned' (with a dashed border), 'North America', 'Northeast', and 'Westcoast'. Each section contains a grid of system 'chicklets' with colored status indicators and names like 'Brown Home', 'White Home', 'Hawkes- Franklin Ho...', 'Fredrikson Home', 'McCarthy Home', and 'Davis Home'. A popover for 'Brown Home' shows details: Status: Good, UID: 00000000121323421, IP Address: 10.0.221.171, Config Name: johnbrownConfig.rpmConfig, Software Version: daVinci5.2.2:1687, OS Version: 10.7.2. A footer contains copyright information and links for 'RMS Home', 'Support', 'Dealer Portal', and 'Contact'.

This modal window is titled 'Create a New Group'. It contains a text input field with the placeholder 'What do you want to name this group?'. Below the input field are two buttons: 'Cancel' and 'Create Group'.

This screenshot shows the 'North America' group. It contains three system chicklets: 'Brown Home' (green), 'White Home' (yellow), and 'Hawkes- Franklin Ho...' (green). A hand cursor is shown hovering over the 'Brown Home' chicklet.

This screenshot shows the 'Northeast' group. It contains one system chicklet: 'Brown Home' (green). A hand cursor is shown hovering over the chicklet.

This is a confirmation modal window. It has a header 'HEADER' and a footer 'FOOTER'. The main content area contains a message: '"Brown Home" saved to "Northeast"'. Below the message is the text 'CONTENT HERE'.

This screenshot shows a group being renamed. The group name 'Nor' is visible in an input field. Below the input field are four system chicklets: 'Hawkes- Franklin Ho...' (green), 'White Home' (yellow), 'Fredrikson Home' (red), and 'McCarthy Home' (yellow). Hand cursors are shown interacting with the input field.

Overview - Dashboard list view

- List view of the dashboard
- User gets an additional level of detail without having to hover and display a popover
- User clicks on a system name to drill down to the System Detail Page for that system.

1. Clicking on the logged in account, users can update their name, avatar, email, and password.

2. Errors are displayed in-line and provide specific contextual help for the condition.

3. Editing displays the same modal "move" window as in grid view.

4. Renaming an existing group is also consistent as method used in grid view.

Savant Logo HEADER Mark Breslin's Account | Logout

%Company Name% All Systems Manage My People

All Systems Savant Residential Management System

Start typing to search for a system

Good Warning Failure + New Group

Unassigned Edit

Status	Name	UID	IP Address	Config Name	Software Version	OS Version
Good	Brown Home					
Good	Hawkes- Franklin Ho...					
Warning	White Home					

North America Edit

Status	Name	UID	IP Address	Config Name	Software Version	OS Version
Failure	Davis Johnson Home					
Good	Brown Home					
Warning	White Home					
Good	Brown Home					
Failure	Davis Johnson Home					
Good	Brown Home					
Warning	White Home					
Good	Brown Home					

Westcoast Edit

Status	Name	UID	IP Address	Config Name	Software Version	OS Version
Failure	Davis Johnson Home					
Good	Brown Home					
Warning	White Home					
Good	Brown Home					
Failure	Davis Johnson Home					
Good	Brown Home					
Warning	White Home					

FOOTER

1 **Mark Breslin's Account Settings** ×

IMAGE

First and Last Name

Image via Gravatar. [Edit](#)

Role: Global Administrator

Email

Change Password

2 **Must be at least lorem ipsum chars, one number, no special characters etc.**

Overview - System Detail Page

- Leverages the same data shown for a given system in EMS.
- User can see customers with invites and invite new customers to access the system via the mobile app.
- User can see employees, dealers, distributors, 3rd parties who have access rights to the system, and can add user access to the system via the system view.
- User can delete invites, and re-invite a user if their invitation has expired.

1. Deleting a named user, removes access to the specific system they may have but does not delete the user record for this user.

2. Triggers a modal dialogue to give access to this system to a named user (e.g. dealer employee, 3rd party)

3. Actions are enabled depending on a given customer's invitation state.

- Accepted = Cancel and invite are not displayed.
- Pending = Can be cancelled or the user can be reinvited
- Expired = Can be reinvited but there is nothing to cancel
- Cancelled = Can be reinvited

4. Invite new customers to this system triggers a modal form window.

5. Re-inviting a pending, expired, or cancelled invitation, pre-populates the form as well as the original message that was sent. We will not maintain an archival state for more than the last invite sent if multiple re-invites have been sent out to a customer.

Savant Logo
HEADER
Mark Breslin's Account | Logout

All Systems > United States > Brown Home

All Systems
Manage My People

The Brown Home

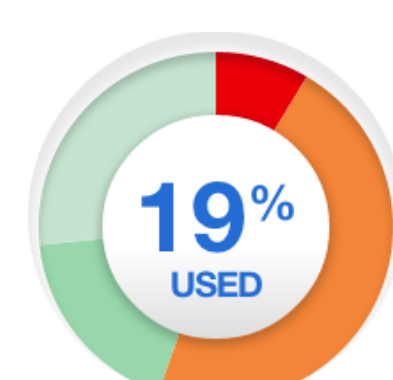
Start typing to search for a system

Host

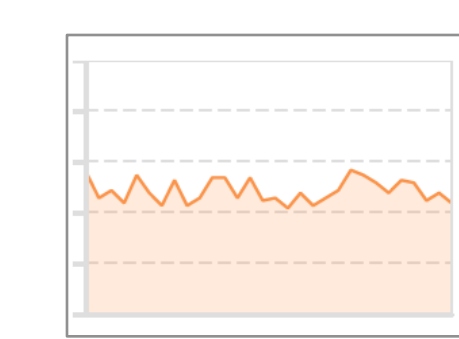
Uptime 0:02:18:59

UID: 000000000012312434
 IP Address: 10.0.231.171
 Config Name: someHome.rpmConfig
 Software Version: daVinci5.2.2:1687
 OS Version: 10.7.2
 Redundancy: None
 Switchover Date: 2.01.14
 Switchover Reason: Standalone

Ram Usage: 19%



CPU Usage: 44%



My People who have Access to this System

Add User Access

Name	Email Address	Actions
Andrew Abbott	aabbott@dealerco.com	Delete
Branson Lewis	blewis@dealerco.com	Delete
Christine Munson	cmunson@dealerco.com	Delete
Paul Young	pyoung@dealerco.com	Delete
lorem@ipsum.com	someguy@dealerco.com	Delete

Customer Invites

Good Warning Failure
Send a New Invite

Invite Status	Name	Email Address	Actions
Accepted 2.01.14	Thomas Smith (admin)	tom.smith@fidelity.net	Cancel Re-invite
Pending - Sent 2.23.14	Jane Smith (admin)	jsmith@gmail.com	Cancel Re-invite
Expired - Sent 1.31.14	Tim Smith	tsmith@yahoo.com	Cancel Re-invite
Accepted 01.24.14	Jenny Smith	jsmith@yale.edu	Cancel Re-invite
Cancelled - Sent 1.10.14	Robert Smith	rsmith@tabor.edu	Cancel Re-invite

FOOTER

1 Delete a Customer
✕

Are you sure you want to permanently remove this user from this system?

Doing so will cancel any pending invitations.

Cancel
Yes

2 Add User Access

Enable a named user to access this system

Administrator?
 Enables a user to manage other users, e.g. invite, delete, move, edit users etc.

Cancel
Add User

4 Send a New Invite
✕

Administrator?
 Enables a user to manage other users, e.g. invite, delete, move, edit users etc.

Hi <% firstName %>

I'm inviting you to join me in using my new Savant Smart Home System. Lorem ipsum dolor sit starter message user can use or modify and customize.

Cancel
Send Invite

5 Resend Invite
✕

Make User an Administrator
 Enables a user to manage other users, e.g. invite, delete, move, edit users etc.

Hi son,

Please respond to this invitation so that you can access our smart home system when you go on break from school. Your mother is getting anxious that you won't be able to experience our newest geewiz toy!

Cancel
Send Invite

Overview - Managing My People

- User management for a Dealer's employees, or 3rd parties (distributors, sub- contractors, or others who need access to send invites, see a system's status)
- Named users populate the RMS via Salesforce API for named users.
- Clicking on a row for a named user expands an "edit" mode where their name, email, and permissions can be updated.

1. A-z sort order functionality with alpha ordered list as a default.

2. Clicking on the row again collapses the row and saves changes. if changes were made, then a success message is displayed.

3. A tally of a given user's system access is available via a modal window while a user is in edit mode. if changes were made, then a success message is displayed.

4. Deleting a user from the RMS only denies them access to the RMS; The user's record still exists in SF.

Savant Logo
HEADER
Mark Breslin's Account | Logout

%Company Name%

My People

All Systems Manage My People

Manage My People
▼

2 Paul Young has been updated

Name	Email Address	Actions
Andrew Abbott	aabbott@dealerco.com	Delete
Branson Lewis	blewis@dealerco.com	Delete
Christine Munson	cmunson@dealerco.com	Delete
Paul Young	pyoung@dealerco.com	Delete
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <input type="text" value="Paul"/> <input type="text" value="Young"/> <input type="text" value="pyoung@dealerco.com"/> </div> <div style="width: 30%;"> <input type="checkbox"/> Administrator? <small>Allows user to lorem ipsum dolar sit what this level of admin allows lorem ipsum.</small> </div> <div style="width: 30%;"> <p>System Access</p> <p>View systems this user can access >></p> </div> </div>		
Tom Robertson	trobetson@dealerco.com	Delete

FOOTER

4 Delete User
✕

Are you sure you want to permanently remove this user?

Cancel
Yes

Full screen modal window, displays confirmation on save

3 System Access for Paul Young
✕

<input checked="" type="checkbox"/> Lorem ipsum	<input checked="" type="checkbox"/> Lorem ipsum	<input checked="" type="checkbox"/> Lorem ipsum
<input checked="" type="checkbox"/> Dolar sit	<input checked="" type="checkbox"/> Dolar sit	<input checked="" type="checkbox"/> Dolar sit
<input checked="" type="checkbox"/> System name	<input checked="" type="checkbox"/> System name	<input checked="" type="checkbox"/> System name
<input checked="" type="checkbox"/> System name	<input checked="" type="checkbox"/> System name	<input checked="" type="checkbox"/> System name
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<input type="checkbox"/> Lorem ipsum	<input type="checkbox"/> Lorem ipsum	<input type="checkbox"/> Lorem ipsum
<input type="checkbox"/> Dolar sit	<input type="checkbox"/> Dolar sit	<input type="checkbox"/> Dolar sit

Cancel
Save