Brandon, Cory, and John going over the custom label builder

7/27/22

The notes below are kind of in random order. We were just playing with the adilas label builder and taking notes as we see them. We will need to reorganize these notes before they become official. Just brainstorming.

* What does it do?
	+ After playing around with it for over an hour, we got labels to work for each section. Some of them where harder then others but we were able to view labels for customers, PO’s, invoices, and parts. That means that there is a path… it just needs to be refined.
* What would we like it to do?
* 1. Images – search for (1) below
* 2. The Build Interface – UI – search for (2) below
* 3. Backend Code - – search for (3) below
* 4. Linking and Navigation - – search for (4) below
	+ (2) The top header doesn’t look like the rest of the app. Maybe check the images and top link.
	+ (2) I like step 1 (name it or pick an existing label). I like step 2 (pick a size – single or sheet).
	+ (2) On step 3 expand the verbiage – what does static or dynamic mean – soften this step a bit… maybe some examples.
	+ (2) On step 3, the dynamic drop-down has hard coded words like customer, part, etc. Maybe pull in corp-wide settings for custom verbiage.
	+ (4) On step 3, we only have options of Invoice, PO, Customer, and Parts. This is where the labels will be accessed from. Maybe help with verbiage and samples. What about carts, recipes, cultivation stuff, harvest stuff, other processes, and even mixed sources. \* We decided to hold off on new ones and just build out the current 4 main label types (po, invoices, parts, and customers). If they need more options, maybe look at connecting things or adding access points from the cultivation or production stuff.
	+ (2) On step 3, if we choose dynamic and part, it then shows an option to enter a part id and a sub inventory id. Check some spelling. It requires an id (one or more). Maybe put in a predictive drop-down or some easier way to get the information into the form. Also, there are no instruction.
	+ (2) and (3) On step 3, in parts, we need both parents and subs. Not everything has both. Be able to do just parents, parents and subs, make it flexible. I think that he is looking for an id number or numbers so that he can look up possible sub attributes. As a note, currently, sub attributes are tied to a specific part category. I could totally envision our users wanting to make a parts label that could bridge multiple part categories. That may require us to take certain fields and tie it to multiple possible values, based on the part category. For example: Let’s say that we put in a field called batch number (top left as a dynamic field). If we tie it to batch number, currently it is only tied to that part category. What if we wanted to use the same label for 10 different part categories and wanted 8 of those categories to map to the batch number (different id or mapping for 8 of the categories but all to the same field or place holder)? What would that look like. Also, what do the labels look like on the 2 part categories that don’t have a mapping? Think about numerous possible scenarios.
	+ (2) When going through the parts label, it required id numbers but then the preview wasn’t showing real data.
* The old label builder used to be a Window’s app. Now it is a web based app.
* I think that it would be really good to make a number of use cases or user stories – for each section. For example: I’m a new user using this for the first time. I would really like to see a demo video or some training to help me know what I’m getting into. Or I’m a user and my manager has already setup a number of custom labels. How do I get to them? Where do they show up? What can I do if I need to edit something?
	+ We need user stories from beginner to advanced.
	+ New customer label, edit customer label, view customer label (preview), use customer label. We need every user story.
	+ We have PO’s, invoices, parts, customers – we need stories for each section.
* (3) The actual code resides on the content server. Can we get to it? Can we modify it? Is it part of a code repo? Is there a fee or license that needs to be held or kept up to date? Does adilas own it or does Calvin own it?
* Notes from Cory
	+ (2) we may want the preview label to open in a new tab. No navigation is currently available other than the back arrow. We need more options.
	+ (3) We got some dumps while testing – static labels
	+ (2) For static labels, the dynamic has to be set to (None) – small bug
	+ (2) Cory noticed that she was able to flip flop on the app, but it doesn’t hold the correct label. We have to be careful. If a label is already setup, it may have older data and settings that may not be able to be flipped. For example: Say the original label was setup as a PO label, then for testing we flipped it to a parts label. That shouldn’t be able to happen. It needs to be locked based on the label type. It’s too open.
	+ (2) As we were testing, it was failing in multiple spots. Cory has some more notes here.
	+ (1) She was having issues saving images to the labels. We did some older images that worked but we couldn’t get anything new to work.
	+ (2) If the grid was on the page where you add the label asset (text field or barcode or whatever).
	+ (2) When moving things, we can drag and drop but it might be nice to use arrow keys and nudge.
	+ There are some notes on EOT # 1455 inside of adilas.
	+ (2) The fields don’t rename after deleting – say field 5 gets put on the screen. Then when we delete it, the next one skips 5 and goes right to 6. This is not that big of a deal but it may through off our users. \* We thought that if we used real names, it wouldn’t matter so much about the numbers. Just a thought.
	+ (2) We would like to see the grid right off the bat. Currently, you have to check a checkbox.
	+ (2) When the field are shown… There is no samples of what they are holding. They are just pink with a number. Also, the tips may need to show actual instructions vs tips.
	+ (2) When setting up the fields, the box sizes are all greyed out. It might be nice to be able to edit them. Not sure about this. \* Looking to combine some steps and pieces here.
	+ (2) The word “merge fields” is too technical, we need to change that. Maybe call it dynamic fields or data driven fields.
	+ (2) We need to work on the header, look and feel, and css.
	+ (2) We need the label name to show up at the top so we remember what we are working on.
	+ (2) Lots of scrolling and tons of white space. We need that, but it needs to be looked at. I saw certain buttons way down from the end of the forms, etc.
	+ (3) There are pages called “top\_secret/secure/alb\_send\_customer.cfm”, “top\_secret/secure/alb\_send.cfm”, “top\_secret/secure/alb\_send\_customer\_process.cfm”, “top\_secret/secure/alb\_send\_process.cfm”, and eventually on the content server “https://www.adilascontent.biz/labels/alb\_show\_label\_pdf.cfm”. As a note, alb is short for adilas label builder (alb).
	+ (3) We found some old info on the adilas label builder – see this URL - https://data0.adilas.biz/MyEasySoftware/adilas\_label\_builder\_app.cfm
	+ (2) When sizing things… it might be nice to be able to zoom in/out, it is really small to deal with.
	+ (2) In the grid mode, they are just pink boxes, you have no idea what was what field. They need a name or value or something.
	+ (2) In grid mode, you can’t add anything else.
	+ (2) We would love to mix and blend steps 4 and 5 together. Make it more of an all in one builder vs step by step forms.
	+ (2) We were curious if we could add formatting to certain number fields. For example: plain, dollar format, decimal formatted, etc.
	+ (2) From Brandon – Cory had to keep clicking “update” and then “save” and if you didn’t go in the correct order, you would potentially lose that button. Just some finicky clicking and JavaScript.
	+ (2) When doing sub inventory, we could get it to work (on a single part label), with sub attributes but it was very particular. We will need to open it up quite a bit and make it more user friendly.

//////////////////////////////

New notes as of 8/1/22 – Brandon and Cory looking at things

Mini projects within this bigger project

1. (1) Be able to upload jpeg and png images to any label. Unlimited images per label. Images will be stored remotely based on the label. If an edit is needed, an image may be swapped out through an edit process.
2. (2) The build interface – multi steps
	1. (2) Add help files to step one and two - verbage
	2. (2) Decide – allow full edits (name, sizes or types, and underlying data points). Some of this could get very deep. Currently, it is wide open but we can see some potential problems there. The main thing that we want to lock down is the label type (po, invoice, customer, parts). Those are specific. All of the other pieces should be editable. We really need the last couple of steps to be fully editable, every time. Layout, sizes, values, pointers (dynamic fields), etc.
		1. Maybe term it as putting in some safety rails
	3. (2) Decide – allow for delete – at what point are we locked in and a delete is the only option (name, size, data type – pointing).
	4. (2) Modifying existing flow and processes – or – adding new flow and processes – maybe two different sections
	5. (2) Steps 4 and 5 need to be merged and built-in together. There is tons of changes that need to be made here… multiple other projects.
3. (3) Backend data tie-ins
4. (4) Linking and navigation to the labels

--------------

Other Brainstorming

* (2) The preview needs to be real time
* (2) When to save, when to update, when to do what… smooth out that process
* (2) On the grid mode, show the label images.
* (2) Request to get all of the label manipulation pieces on one page. This includes the add new label feature buttons, sizes, drag and drop, layout options, display values, fields and all of their values.
* (2) Cory wants to get rid of the tips and turn them into real instructions and/or mini help files or modal pop-ups.
* (2) It might be nice to add in some predictive drop-down options on the custom field mappings.
* (2) On the display mode – currently it shows the field type and a number. That doesn’t mean anything. Let’s help make it really mean something useful.
* (2) What about deleting fields. You can do it currently, but you have to bounce back and forth between screens.
* (2) Ideally, we want the add new buttons, the grids, and the details all on the same page.
* (2) Save as often as you want… Less back and forth or confusing steps. If you want to save, you just save it.
* (2) and (4) On the preview – we ran into a refresh problem. We made the change and it didn’t show up for awhile. We may need help do a force refresh.
* (2) and (4) When finishing up the label building process, it kinda deadends. We have no other navigation options. We could look into multiple tabs or windows or make the navigation more round trip.
* (4) After the fact, when actually requesting a label, be able to leave the quantity blank and treat that just like a zero value. We only want to print the labels that are needed and/or requested.
* (3) and (4) On the testing and scenarios… we make huge labels and pull in every possible option. Test all of the pieces.
* (2) On the grid, we kinda like the snap-to and we kinda don’t like the snap-to feature. Also, is there a way to turn that on/off or change the grid size? That would be really cool and would allow for more custom placements.
* (4) After the fact, when linking to an actual label, to use it, if there are only one label choice, make sure and select it. Basically, if there is only one record count or possible labels for a certain type (PO, invoice, customer, parts) – auto select that label. This on the top\_secret/secure/alb\_send.cfm page.
* (2) Also, as a note, as we were adding fields and trying to edit things, if you didn’t do the exact right process, it felt like you would lose things. Even it you really didn’t, it felt like you lost some things.
* (2) We did a really big label and on step 5, the field settings and the label could fit on the same page. There was some overlap and it looked a little bit funky.
* (3) As a thought, what if we put an issue or request on paper and then tied a screenshot to that issue or request. Let the developer know what we are seeing. That may help in some places.
* (2) On the dynamic fields – we may need a sample or a data dictionary. Some of the fields are not very self-explanatory.
* (2) Possible request – When you select a dynamic field, it might be nice if it gives you a small title as well. For example: Say the dynamic field <<line\_quantity>>. It might be nice if it did something like this: Line Qty: <<line \_quantity>> or Line Quantity: <<line\_quantity>>
* (3) As a note, the chevrons are special characters. We can’t just use the keyboard and add multiple less than and greater than symbols. It is a special character. They are smaller and closer together and if you delete it, both values get removed as if they are a single character. This is kinda techy.
* (2) We would like to get some formatting (dates, times, decimals, integers, currency/dollars, commas, etc.). We could build that in on a per field value (hardcode it) or we could let the users select and add in the formatting on the fly.
* (3) As we were testing… we found that some of the sub inventory pieces on invoices and PO’s need to be built out further. We may need to include some of this development in the process. For example: fields like sub\_reference\_id in the po\_invoice\_lines\_[53] table. The fields exists in the database but have not fully been linked up. Also, if we do end up building this out, we need to go backwards and do some bulk clean-up to update all of the water under the bridge (old database records).
* (3) Talking about cart labels – the cart is just memory in a session. We may need to build based on the invoices or PO’s because they exist in the actual database. They should contain the same information, it is just that the actual invoices or PO’s exist in the database. We can get back to it (the data) and we could even pull it from a different page or source (not tied to the session).