Complete Listing of UAR ABLE System Features

UAR ABLE was created in 2001 before we thought there was a good framework out there. We no longer recommend our framework for use today for anything other than very custom solutions that wouldn't benefit from using community-driven frameworks. We remain quite happy with the strong frameworks and platforms supported by excellent communities, and recommend these to our clients.

We provide this document as evidence of what we've been doing since 2001 with PHP, SQL, and Architect-level design. The experience earned by creating this has been valuable to us and our customers.

Features	Benefits
User Security	1. User permission control down to the function level by system module, meaning any user can be assigned any combination of security levels that can be configured to control access to any part of the site 2. Ability to allow users to self-manage permissions to as finite a level as is needed 3. Allows for group and user management
Content Management System	1. Edit text as easily as writing an email in Google's or Yahoo's email system 2. Use the same content across your website easily; write it once, and use it in as many places as you'd like 3. Allows branding by department, company, and any other method you'd like to offer well-managed content flexibility 4. Can integrate with and produce any front-end visual presentation 5. Allow for custom displays and dashboards based upon roles and responsibilities, possible through the use of the user authentication module 6. Make site-wide changes simply and cost effectively 7. Site Maps can be automatically created 8. Manage files used by your Internet or Intranet site easily 9. All content can be indexed for easy searching
Person Management	1. Use your database of people as the foundation to drive any functionality you wish based on any role you wish 2. Capture custom fields based on any role, and map any relationships you want 3. Track access and updates by person 4. Provides critical data for increased efficiencies when used with other features, such as the mass mailer, newsletter, alerts, employee management, and more 5. Track notes, classify notes, and prioritize notes

	6. Track follow-ups, and display on personal dashboard 7. Assign alerts to trigger for sending to people 8. Assign classifications that perform special functions, such as highlighting a person in red and labeling as "VIP" 9. Manage newsletter subscriptions from the person level 10. Track all data you'd find in your typical CRM 11. Search data multiple ways 12. Require and don't require field entry based on role 13. Associate with groups for special processing, such as groups for marketing or sales campaigns 14. Efficiently drives display of contact information throughout the website 15. Associate with user account for easy administration
Organization Management	1. Includes every feature available in the Person Management feature listing, and the following: 2. Associate with accounts for billing purposes 3. Display all relationships between people and an organization and between other organizations 4. Produce reports that list out all organizations, and all associated people

Newsletter Management	1. Create any number of newsletters for any number of purposes; examples:
	   a. Customer Newsletters
	   b. Potential Customer Newsletters
	   c. Internal Operations
	      i. By Employee Type
	      ii. By Department
	   d. Vendor Updates
	   e. Reseller Updates
	2. Present newsletters automatically on your Intranet or Internet
	3. Every newsletter can be managed based on interest of the potential subscriber and based on permissions you grant; examples:
	   a. Subscribers will only see newsletters of interest to them
	   b. If you do not wish certain user groups to see certain newsletters, they won't
	4. Insert database-driven fields into newsletters for "mail merge" like features
	5. Manage subscribers that are in your person database and those that aren't; it's your choice
	6. Allows for subscriber self-administration

	7. Unsubscribe links and custom footers can be appended to any newsletter automatically if desired
	8. Manage subscriber lists dynamically, based on any data field in the system. Examples of groups you may want to send the newsletter to:
	    a. Employees
	    b. Customers with certain modules
	    c. Potential customers
	    d. Vendors
	    e. Resellers living in the zip code of 55555

Report Manager	1. Create rich, dynamic AJAX-enabled reports 2. Create simple reports with ease 3. Manage access to reports to a deep level of granularity 4. Allow for quick links to relevant portions of the system for easy navigation 5. Email out reports automatically 6. Manage metadata on reports 7. Enter parameters dynamically for drill down into report detail 8. Produce any output you desire; currently Excel and HTML outputs are generated 9. Custom reports that act as dashboards to perform work can be created for any purpose. Interact with data efficiently, and all at once versus having to go to each individual item to update it

Time Tracking & Monitoring	1. Track time any way you want using any interface you desire:
	    a. Grid view
	    b. Individual time entry
	    c. Stop watches
	2. Track time as a means to manage payroll
	3. Track time as a means to manage projects and budgets
	4. Use employee-entered data to analyze and forecast time to complete operations, structure and plan for education sessions, and improve individual performance based on patterns of poor productivity for a particular activity
	5. Manage formally and systematically the review of every time card
	6. Enter time as billable or not billable
	7. Employees can override a billable rate if that option is desired
	8. Employees can associate their time with specific functions within a function if desired. For instance, a customer may want to view time spent by project phase

	9. AJAX-driven calendar display for date selection or manual entry 10. AJAX-driven type-ahead that allows for quick look-ups of projects and internal time-tracking accounts to allocate time against
System Features	*Note; these are comments that only your resident software developer(s) may understand.* 1. The framework utilizes the Page Controller pattern for a standardized process workflow. Each page can be configured with a number of commands, conforming to the command pattern 2. The strategy pattern is used throughout the framework to allow for runtime configuration of the system and to enable variable functionality for the data models and display components 3. The framework has been written in conformance with a number of design principles, making it agile and flexible, which allows for easy accommodation of localized change and custom workflows on an as needed basis. 4. The framework is configured in a shared library arrangement and allows for any number of website instances to be created. Each of these instances can be deployed in any configuration necessary, all while working off of the same class structure 5. The framework can be deployed as SaaS, as a virtual machine, or as an installation on a standard server. The server requires a LAMP environment running Apache, PHP, and PostgreSQL (please contact UAR for the exact version)
Project Management	1. Create custom billing rates by project 2. Create custom billing rates by employee level of knowledge 3. Use a dashboard that allows project managers to see at a glance how all projects are performing monetarily using a green/yellow/red color code 4. Allow for any number of phases within a project 5. Assign employees that can bill to a project 6. Associate any number costs you wish to track by project 7. Intuit QuickBooks interface exists, and is capable of working with any QuickBooks chart of accounts using Intuit's API 8. Ability to have alerts triggered based upon thresholds, such as a certain level of billable time reached, a certain amount of time not reached, cost levels, profit levels, and any other rules by which you'd like alerts triggered

	9. Associate default billing rates
	10. Generate detailed billing reports to PDF with the click of a button
	11. Allow for subcontractor billing, which grants access to very specific Intranet features, and nothing else
	12. Ability for project manager to track employee efficiency using desired billing thresholds by employee
	13. Billing Report dashboard allows for a quick means of updating data for a billing period rapidly
	    a. Search and replace functionality
	    b. Ability to run report looking for specific exceptions
	    c. Click to edit any data field, and the core data is updated
	    d. Run multiple views of the report for easy comparisons across time periods
	    e. Show totals for billable and non-billable time by employee
	    f. Quickly fill in dates for the report (last month, this month, last week, etc)
	    g. Show summaries of all billable time for a time period
	14. Ability to quickly see employee performance over several projects

Wikis	1. Promotes collaboration through shared education and posting of knowledge in a centralized location
	2. Enables a learning culture
	3. Allows employees to show they are contributing, and allows management to see specific contributions by employee easily
	4. Create any number of wikis for any use
	5. Categorize and subcategorize wikis for enhanced wiki-to-wiki association to allow for very easy navigation
	6. Assign wiki read/write permissions to users and groups
	7. Supports images, video, and customized code
	8. View all wikis in multiple ways
	9. Uses:
	    a. Internal policy
	    b. Procedures
	    c. Educational material
	    d. Best practices
	    e. Personal wikis for tracking any personal education one wishes to retain and manage well

Blogs	1. Use blogs for posting information about any topic to the Intranet or Internet

	2. Uses are very similar to wikis except that a Blog is typically administered by a single person or entity. Uses:
	   a. Department announcements
	   b. Personal virtual work journal of lessons learned
	   c. Typically, people use them for more creative and personal expression
	3. Will release to the Intranet or Internet at a specific time you define, allowing you to write as many blog entries ahead of time as you desire
	4. Output can be displayed in any fashion
	5. Supports images, video, and customized code
	6. Allows for easy security permission handling in terms of administrative access and viewing access

Surveys	1. Create any number of surveys for any use. Example uses:
	   a. Customer questionnaires, trackable from the customer contact
	   b. Post-event follow-ups, trackable from the customer contact
	   c. Quality control surveys to employees, vendors, or customers, trackable at all contact levels
	   d. Employee performance review assessments from an employee perspective, and track on the employee contact
	   e. Employee performance review assessments from a managerial perspective, and track on the employee and manager contacts
	   f. Post project lessons-learned surveys, trackable at the project level
	2. Can be administered publically or privately
	3. Responses can be collected anonymously
	4. Statistics are recorded based on survey responses, and output can be customized as needed
	5. Multiple export options
	   a. Data can be exported to CSV for processing in Excel
	   b. Data can be exported to a PDF in a basic grid layout
	6. The survey module can be configured with a category to group survey questions together logically
	7. Through the use of answer sets, different types of data can be collected by the survey module. Examples include a range selection (1-5) or free text through a comment or text control
	8. The underlying structure makes it easy to extend and write custom views for displaying the survey any way you want to your targeted audience

UP AND RUNNING
SOFTWARE DEVELOPMENT

Form Creation	1. Create forms for any purpose, generally to guide data collection using a submission process 2. Have form submission results be stored in a custom database programmers create for you or be sent to a specific user you define 3. Associate with any page on the Internet or Intranet, and define who has access at a group or user level 4. Custom response actions can be selected for a given form that dictates how the submission will be handled (email results, record to a database, etc...) 5. Supports the core set of form GUI widgets used throughout the framework. This provides the ability to use Web 2.0 technologies on most of the data specification controls
FAQ Manager	1. Use to record questions and answers easily 2. Categorize FAQs for search and presentation purposes 3. Create any number of FAQs for any purpose 4. Publish to any portion of the Intranet or Internet easily 5. Any representation of the question data can be rendered from the basic data model, meaning the data can be delivered anywhere on the website easily in any format you want, using the same base data
Link Manager	1. Use to create links and deploy them to any portion of the Internet or Intranet site easily 2. The same base data can be used to populate multiple pages of a website 3. The links can be part of a menu and integrated into the main site navigation or inserted at any point on a page as a sub menu or list of resources

Data Field Extender	1. Extend the ability of any entity for any need easily. Examples; add custom fields for:
	   a. Customers
	   b. Vendors
	   c. Organizations
	   d. Employees
	   e. Projects
	2. Offers extreme flexibility in deciding what data you wish to capture and how

Mass Mailer	1. Send out emails to anyone in the system using custom lists or custom queries 2. Ability to preview prior to submission 3. Uses intelligent sending processes to minimize likeliness of being labeled as spam by internet service providers, server-

	based mail servers, and application-based spam filters
Room Manager	1. Create, edit, and delete any number of rooms 2. Ability to associate people with rooms for events 3. Ability to capture any relevant data you need about rooms, such as room size, assets, layout, etc 4. Ability to associate an image map with a room, which can be used as the foundation for seating arrangements/availability, asset placement, and AJAX-based mouseovers of descriptive information 5. Manage costs per room
Event Manager	1. Manage one-to-many events easily 2. Set up a web-based form for handling a single event 3. Allow for capture of customer and attendee information 4. Allow for account creation and maintenance after login 5. Allow for management of multiple sub-events (seminars, training sessions, meetings, etc) within an event 6. Offer several offerings of each sub-event 7. Collect evaluations by event offering
Payment Processing	1. System can work with any merchant account (may require custom programming to work with interface) 2. Currently integrates with PayPal completely
Administrative Manager	1. Update and manage system data, the data that your system needs to operate 2. Access any administrative function you are granted access to 3. A nice, easy interface for super users to monitor and manage your system 4. Control access to protect your system's most important features: security preferences allow you to define which users can access your administrative features
Graphs	1. Graphing features exist, allowing graphs to be created for any dataset desired 2. Currently integrated with survey module and project management module 3. Graphs can be implemented for any list style data
Security	1. SSL capable (recommended) 2. User authentication and authorization model is rich, capable of handling any complex access scenario that's presented
Menu Editor	1. Manage menus on external and internal pages easily 2. Create sub levels and page associations quickly

Spell Checking	1. Spell check any content entry 2. Spell check all website content at once, creating a list of possible exceptions, saving webmasters time

Calendars	1. Create any number of calendars for any purpose, deployable to Intranet and Internet sites
	2. Schedule events
	3. View events in any format; examples:
	    a. Day view
	    b. Week view
	    c. Month view
	    d. Six-month view
	4. Use for shared calendars to manage administrative activities for any entity (departments, employees, customers, etc)
	5. Send alerts to multiple people using the alert scheduler
	6. Customize input and output of calendars based on any other data in the system

Payroll Management	1. Ability to run payroll reports of employee activity over a defined timeline 2. Interaction with Intuit's QuickBooks for payroll processing 3. Tightly integrated with time management features
Job Manager	1. Allows for any number of entities (organizations or departments for example) to create and post jobs 2. Allows for administrators at an entity level, allowing them to grant access to the system to other members of their entity as they desire 3. Candidates can sign up for job posting alerts and RSS feeds 4. Candidates can upload as many resumes as they desire, and use those resumes to apply to as many jobs as they desire 5. Anyone may apply; internal and external applicants are supported 6. If you use the system to manage HR data, you can quickly view an employee's data, such as performance reviews, post-graduation education and training, skills, goals progression, and more

Candidate Manager	1. Organizations can use the candidate manager to manage candidates for positions
	2. Create any number of job candidacy states; examples:
	    a. Applied
	    b. Reviewed
	    c. Rejected
	    d. Job Offer Extended
	    e. Candidate Opted Out

	f. On Hold 3. Enter notes and upload documents 4. Surveys could be used to capture employment interview data that is commonly collected for candidates
List Manager	1. Create data in lists for any purpose, such as news, announcements, alerts, etc 2. Place such content in multiple places on your Intranet or Internet pages 3. Updating the content in one place will update them all quickly
Search	1. Any entity in the system can be indexed at the field level 2. Entity-level searches can occur for very specific data 3. Global searches can search the whole system to produce results, all accessible based on user permissions.
Alerts	1. A flexible system designed to send out alerts in any situation for any reason, using any data in the system 2. Useful for events and state changes 3. Global management allows for cleaner programming and consistency in approach 4. It can email results, push pop-up alerts to the browser window, or display a message in the regular HTML stream

Location Manager	1. Create and manage any number of locations
	2. Allow for sub-locations to be created and categorized based on their location in the overall location hierarchy. Example uses, using a hotel as an example:
	   a. Create a hierarchy of hotels and types of rooms
	   b. Create a hierarchy of hotels and available resources
	   c. Create a hierarchy of stores and restaurants nearby a hotel or organization
	   d. Map out every administrative office and employee with an organization, across the world
	3. Image maps and videos can be associated for greater interactivity, such as virtual tours and clickable drill down using a visual map
	4. Provides an important entity for cross linking of data. Associate with any data in the system. Example uses:
	   a. List out chefs and event staff by facility
	   b. Integrate with menu offerings
	   c. Display room, resource, or administrative data by location

Quality	1. Use to track statistics overtime, and present data against benchmarks of your choice

Management	2. Group quality components for presentation and organization purposes 3. Publish privately or publicly as needed in data list or graphical views 4. Example uses: tracking positive and negative occurrences in a company to view progress and notice trends
Charges Manager	1. Record the charges for any type of service or product 2. Categorize charges into groups 3. Integrate with an inventory management system 4. Associate with menu items 5. Manage retail and wholesale costs 6. Associate costs based upon the event, customer, location, and any other entity in the system 7. Use to display to vendors, customers, and any other entity online, showing them the price you want them to see
Glossary	1. Create a list of terms and definitions for placement on any Intranet or Internet webpage 2. Terms are automatically inserted into pages using Web 2.0 technology 3. Makes for simple management of definitions 4. Exclude pages and content from automatic insertion
Accessibility	1. The Content Manager allows the system data to be presented in any way, meaning data can be deployed any way. Hence mobile phone access views can easily be created using the same data 2. Data can be accessed from any standard, updated, and compliant web browser
System Statistics	1. Lines of Code as of 11/14/07: 723,474 2. Database Tables as of 11/14/07: 204 3. Man hours as of 11/14/07: 12,750

Thank you for your interest and time. If you have questions, we hope you please call Ian McKilligan at 906-281-2627 or Peter Hanson at 906-281-1178.