Preserve Mobile
Enhancement Quick Guide - iOS

Project:	Status Reports
Overview:	Users assigned REO orders for certain clients will now be able to complete and send status reports directly from the field.

Status Report Details

- Status reports will not be available for all work orders.

- Status reports can be completed by all users regardless if the user is a sub or main.

- Filling out a status report is not required to complete a work order on a device.

- Status reports done on the device will have the same questions and photo requirements as those done on desktop.

- Users will be able to send multiple status reports from the device for a single work order, but the prior status report must be fully transmitted, or off the phone (by uninstall/reinstall if not transmitted), to start another.

- Users can only take photos for status reports — videos cannot be added.

- As with work orders, users must answer all required questions and take all required photos in order to queue and transmit a status report.

- Unlike work orders, once a status report is queued, additional photos cannot be added. The original status report will have to be transmitted (or removed from the device) and a new one started in order to include more photos.

- Unlike work orders, status reports done on a device do not get transmitted into SafeView Preserve Web for completion; responses are sent directly to the client from the field.

- As with desktop status reports, responses are not internally audited by Safeguard before being sent to the client.

- It may take a status report up to one hour to successfully transmit and flip over to "Sent" on the Queued Order Details Screen due to processing on Safeview Preserve Web; users are to continue their work day as normal during this time. A status report may appear as failed on the device even though it is still just processing – if a report displays with an alert, click "Reset" then "Transmit" again to update.

# Application Updates
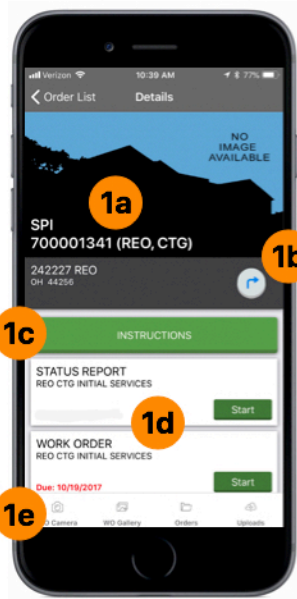
Work Order Details Screen

1 **The Work Order Details Screen has been reconfigured into a property dashboard**
Property information and other elements have been reorganized on the screen to improve user understanding and allow for the addition of status reports.

1a. *Property Details*
The client, work order number, loan type and work order type have been moved up the screen and are now displayed over the property image.

1b. *Map/Directions*
The directions button has been visually updated and is now more correctly placed next to the property address.

1c. *Instructions*
An "INSTRUCTIONS" button has been added and takes the user to the newly separated Instructions Screen.

1d. *Property Cards*
Work orders and status reports will now display as individual property cards, allowing for status reports to be handled separately from a work order, yet still tied to the same property. This card approach sets up the framework for being able to add other cards like property notes, damages, or bids in the future.

1e. *Bottom Navigation*
Links to other main screens in the app have been brought forward for quicker flow throughout the application.

Links include (from left to right):
- <u>WO Camera</u>
  Opens that work order's camera.
- <u>WO Gallery</u>
  Takes the user to the gallery for that work order.
- <u>Orders</u>
  Takes the user to the New Order List Screen.
- <u>Uploads</u>
  Takes the user to the Queued Orders Screen.
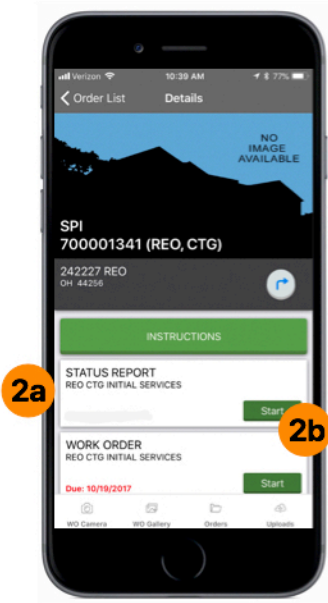
2 **When available, a status report card will appear on the Work Order Details Screen**
Status report cards will always appear above the work order card and under the instructions.

A status report card will display the following information:

2a. *Status Report Description*
The card will display the description of the status report being completed.

2b. *Call to Action*
The card will help the user understand his or her status report completion progress with clear call to actions.

The completion progress states of a status report and their correlating call to actions are:

Unstarted
- Green "Start" button which upon click takes the user to the Status Report Stations Screen to start a status report.
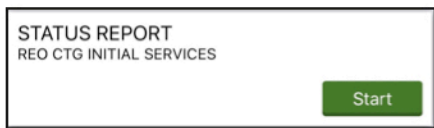
Started, Incomplete
- Green "Resume" button which upon click takes the user to the Status Report Stations Screen to complete a status report.

Completed
- Green "Queue" button which upon click moves the status report to the Queued Orders Screen and takes the user there to transmit.
- Blue "Update" clickable text which upon click takes the user to the Status Report Stations Screen to make edits prior to queuing the status report.
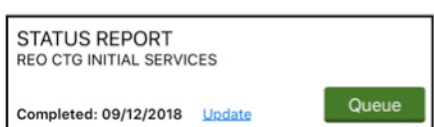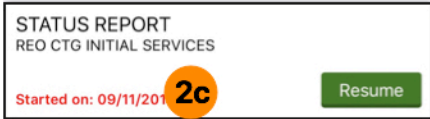
Queued
- No CTA, card just displays "Queued".
- *Note: If a status report is queued, but the work order is not, the order will remain in the user's New Order List; it will only move to the Completed (Sent) List if the work order has been queued.*
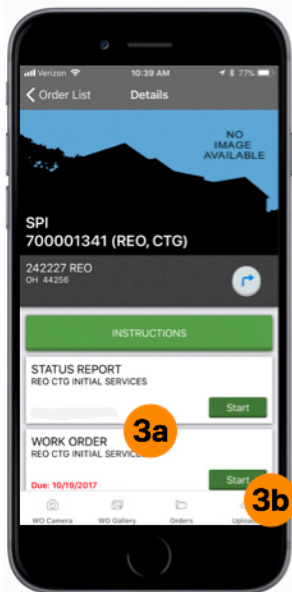
Transmitted
- The whole card gets removed and is replaced with an "+ ADD STATUS REPORT" option since the user is able to start a new status report.

2c. *Started/Completed Date*
When a status report is started, a started date will be added to the card. Once completed, the card will display the completed date.

3 Elements from the previous Work Order Detail Screen have been combined to create work order cards
Work order cards will appear directly below the instructions if the option to complete a status report is unavailable.

A work order card will display the following information:

3a. *Work Order Description*
The card will display the description of the work order being completed.

3b. *Call to Action*
The card will help the user understand his or her work order completion progress with clear call to actions.

The completion progress states of a work order and their corresponding call to actions are:
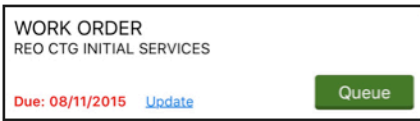
Unstarted
- Green "Start" button which upon click takes the user to the Work Order Stations Screen to start the work order.

Started, Incomplete
- Green "Resume" button which upon click takes the user to the Work Order Stations Screen to complete the work order.

Completed

- Green "Queue" button which upon click moves the work order to the Queued Orders Screen and takes the user there to transmit.
- Blue "Update" clickable text which upon click takes the user to the Work Order Stations Screen to make edits prior to queuing the work order.

Queued

- No CTA, card just displays "Queued".
- *Note: If the user adds additional photos to a work order while it is in the Completed (Sent) List, the "Queue" button will go back to being green and active since the user will need to queue the new photos for transmit.*
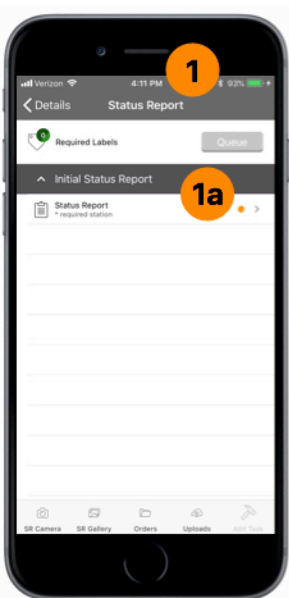
Transmitted

- No CTA, card just displays "Transmitted".
- *Note: If the user adds additional photos to a work order while it is in the "Completed (Sent)" List, the "Queue" button will go back to active since the user will need to queue the new photos for transmit.*
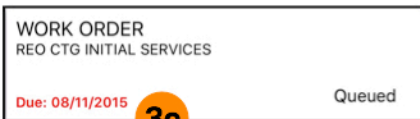
3c. *Due Date*
Work order due date will display black if current and in red if past due.

Status Reports

1   **The Status Report Stations Screen will look and behave the same as the Work Order Stations Screen**
Updated layouts along with consistant calls to action across both stations screens to help create clear direction for the user.

1a.   Color indicators help notate the completion status of each station (no indicator will display if the station has not been started, a yellow indicator will display for an incomplete station, and a green indicator will display for one that is fully completed).
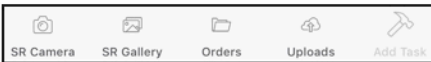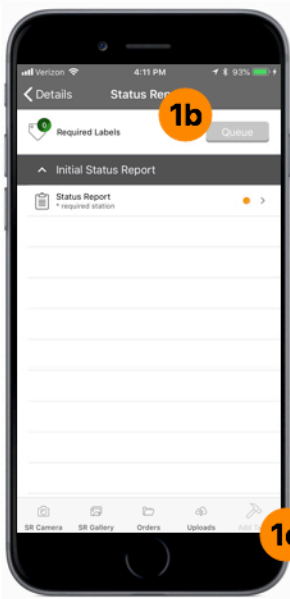
1b. Users will able to queue a status report from the Status Report Station Screen by clicking on the "Queue" button. This button will only be active if all required questions have been answered and photos have been taken.

1c. *Bottom Navigation*
Links to other main screens in the app have been brought forward for quicker flow throughout the application.

Links include (from left to right):
- SR Camera
  Opens that status report's camera.
  Note: *Only photos taken with the status report camera will be added to the status report. Photos taken from the Work Order Details Screen will get added to the work order, not the status report.*
- SR Gallery
  Takes the user to the gallery for that status report.
  Note: *Only photos taken within the status report and with the status report camera will appear here. These are the only photos that will be transmitted with the status report.*
- Orders
  Takes the user to the New Order List Screen.
- Uploads
  Takes the user to the Queued Orders Screen.

2 The Question Screens for status reports will look and behave the same as the ones for work orders
Similar constructs and behaviors help ease adoption with quicker learning curves.

2a. Color indicators, that match the stations screen, help notate the completion status of each station (a yellow indicator will display for an incomplete station, and a green indicator will display for one that is fully completed).

2b. Clicking on a triggered label tile will flip open the In-Report Camera. Clicking on the label tile again will flip the report questions back.

2c. Triggered label count will display in the upper right hand corner and can be clicked to access the Status Report Labels Screen.

2d. If a user clicks back to the Status Report Stations Screen and then returns, he or she will be taken to first unanswered status report question (same as with work orders).
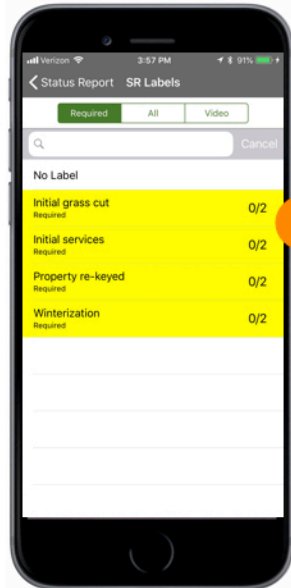
3 **The Labels Screen for status reports will look and behave the same as the one for work orders**

The Status Report Labels Screen will be named "SR Labels" and will only show labels triggered by status report question responses.

As with required work order labels, required status report labels will be removed from the "Required" tab as they get fulfilled by the user.

4 **The gallery screens for a status report will look and behave the same as the existing ones for a work order**

When accessing the gallery, users will first see the Gallery Label Selection Screen (4a) for that status report; on this screen, users can click a single label to view associated photos, or click the "View All" button and be taken to the Gallery View Screen (4b) .

Note: *Again, the Status Report Gallery and Work Order Gallery are separate. The Status Report Gallery will only show photos taken with the status report Camera. This camera is only assessible within a Status Report.*
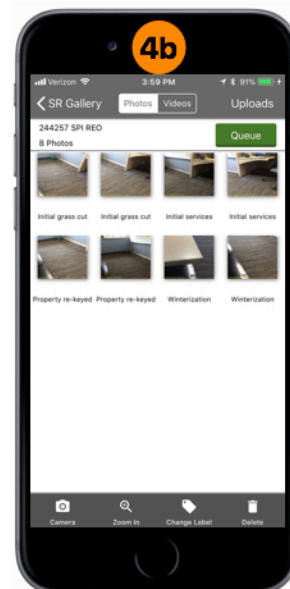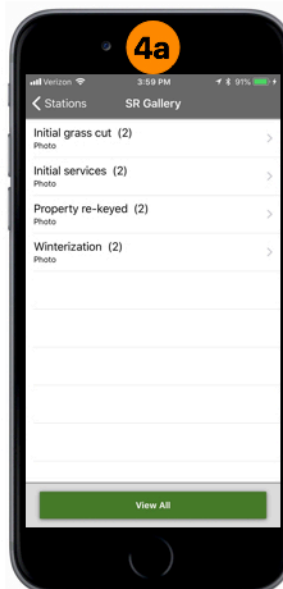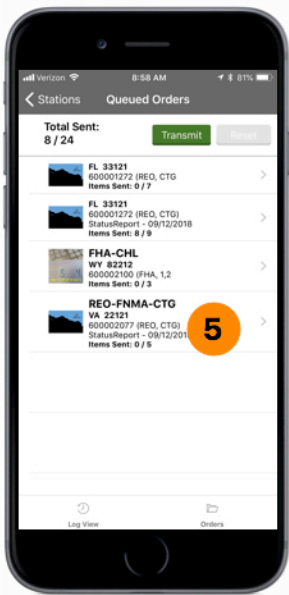
5 **Status reports will display the same way as work orders on the Queued Orders Screen**

Status reports will get their own property row that can be clicked on to view the Status Report Details screen.

- The Queued Orders Screen will keep the same construct as today, but additional property information has been added for clarity.

- Status reports will be identifiable by the additional line displaying "Status Report - " and the completion date.

- Clearer "Transmit" and "Reset" buttons have been created to help the user through transmission.

- Instead of having to reset orders individually, a user can reset all failed orders by clicking the "Reset" button.
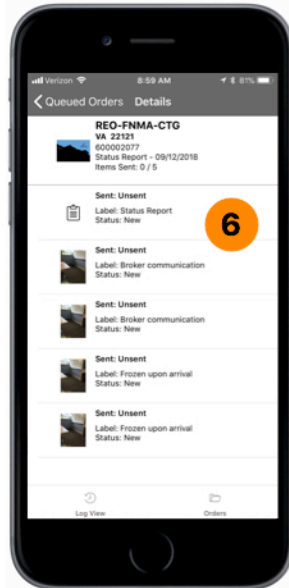
6 **A status report will also display in the same manner as a work order on the Queued Orders Details Screen**

The status report and all photos will be listed as items underneath the property row.

- The Queued Order Detail Screen will also keep the same construct as today, but additional property information has been added for clarity.

- Status reports will be identifiable by the additional line displaying "Status Report - " and the completion date in the property row.

- A green checkmark will appear next to the thumbnail of items that were transmitted successfully (same as a work order).

- A red alert icon will appear next to the thumbnail of any item not successfully transmitted (same as a work order).