Proposed M-RETS Upgrades

Enhancement Committee

October 16, 2012

Enhancement Committee

- $250K was allocated by the Board for improvements
- EC Charter
    - Gather and prioritize improvement ideas (Jan – Sept 2012)
    - Create and submit Change Requests to APX (May – Sept 2012)
    - Make recommendations to Board (Sept 2012)
- Volunteer membership
- Change Requests (CRs) focused on improving user efficiency (account holder survey reinforced)
    - Filtering capabilities
    - Sorting options
    - Navigation between pages
    - Compliance verification

Major Upgrade for M-RETS

- Majority of CRs can be accommodated by modernizing M-RETS platform using Telerik
- Greatly improved user interface for existing reports
  - Sort, paging, filtering
  - Functionality similar to Excel operations
  - Fast loading of large data sets
- Better platform for continued improvements
- Grid/table component enhancements (Phase I)
- Universal navigation bar/dashboard (Potential Phase II)

Upgrade Timing

- Completion of upgrade for priority CRs by 1/31/2013
- User testing and training February/March
- Remaining functionality implemented after mid-July (remaining reports)
- No production releases between March 1 and mid-July

Phase I: Telerik

- Filter criteria (multi-select criteria, e.g., filter on WI or IL eligibility)
- Advanced filter to filter on all criteria
- Ability to save/search on saved filter criteria
- Ability to sort on more than one column
- Ability to toggle to display/hide columns
- Ability to print, save the table results

Phase I: Telerik

- Dynamic Search Criteria

Demonstration

DEMO

- http://demos.telerik.com/aspnet-ajax/grid/examples/programming/draganddrop/defaultcs.aspx

- More information on Telerik can be found at: http://www.telerik.com/products/aspnet-ajax/grid.aspx

EC Recommendation

- Received Board authorization for payments of up to $125,000 from enhancement fund
  - The Telerik platform upgrade (Phase I) for all M-RETS reports ($96K)
  - Remaining CRs not covered by platform upgrade ($29K)

What Does This Mean to You?

- Modernized M-RETS interface with increased user efficiency by end of January 2013
- Training opportunities February/March 2013
- Continued M-RETS improvement ideas
    - Fill out a Change Request form and send to Amy
    - Send an e-mail to an EC member outlining your idea
    - Join the EC!

Questions?

Phase II: Navigation
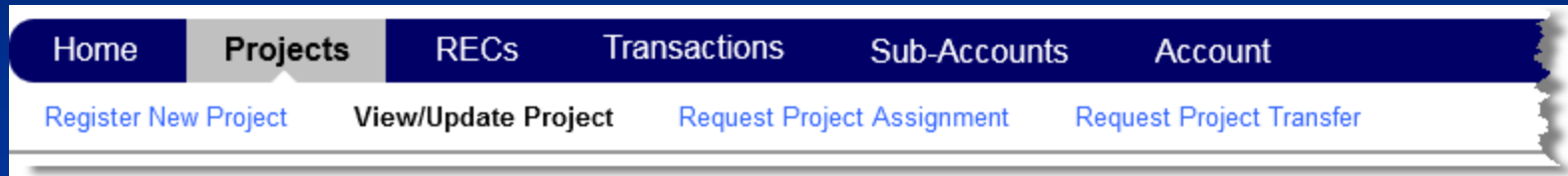
- Add new navigation (bar or tabs) to top of screens
- 2-tier
- Provides access to existing screens and used to initiate existing actions (e.g., request project transfer)
- Navigation options displayed based on account type and user rights (e.g., "Projects" only displays to accounts that can register projects)

Phase II Opportunity

- Improved navigation
    - Multiple tab headers
    - Hyperlinked information from project record
    - Return to previous screen used instead of home screen after task completion
    - Other ideas?
- Dashboard (home page) improvements

Phase II: Project Record

- Tabs visually group project information, increase ease of access to info
- Break out generator info onto multiple tabs (so screen isn't so long)
- Icons to convey tab-related info (e.g., more info is needed)
- Tabs displayed based on user role, account type

Phase II: Pending Transactions
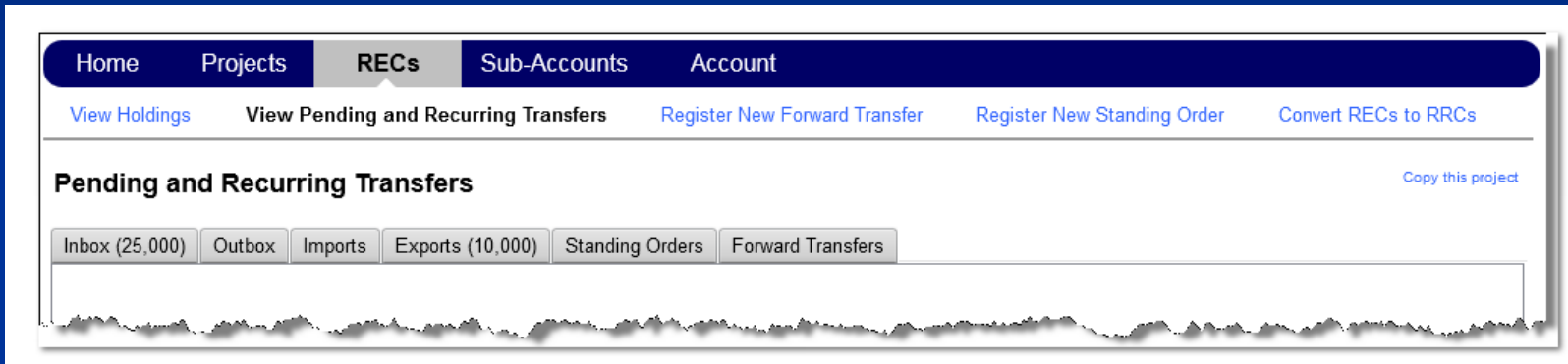
- Groups and displays pending transfers and recurring transfers

- Provides more info, functionality to handle incoming transfers/imports

Appendix

- For examples of upgrades, see Change Requests in your packet