



STATEMENT OF WORK CHANGE REQUEST ESTIMATE

| | | | | | |
|-------------------|----------|------------------|--------|------------------|------------|
| Client | NHS | Project | DEV | Site | NH-ALL |
| Client Reference | NHS-CR1 | Aptean Reference | 319310 | Estimate Version | 1.0 |
| Prepared By | A Walker | | | Estimate Date | 22/07/2014 |
| Invoice Reference | Unknown | | | Priority | 3 |
| Customer | N/A | | | System Version | Latest |


Client Request

Request to be able to record the mobile device as to which driver it has been allocated to, to ensure that traceability of the individual devices should they not be returned at the end of a shift

Aptean Solution

Whenever an Android device connects to the server, the connection message includes some information about the device:

- ID - the message ID
- SITE/USER/PASSWORD - application logon information
- DEVICE_ID - e.g. 6d3430d35d1196dd
- GPS_STAMP - e.g. 53.348655750000006,-2.85211645
- DEVICE_OS - e.g. android 2.3.3
- DEVICE_TYPE - e.g. Dell Streak

The DEVICE_ID will be used to create a record on a table within *CALIDUS* ePOD. This will hold a list of all devices that have ever connected to the system, with a last used date, time and driver.  **Note:** This is not intended as an audit trail, rather as a list of how many devices there are.

A Name field will also be added to this table, to allow Admin users to maintain user-friendly names associated with their connected devices.

A *Devices Maintenance* screen will be added to the *CALIDUS* ePOD Admin *Maintenance* menu. The screen called from this will allow users to report on devices, maintain user-friendly device names against the IDs and save them.

This screen will allow filtering on:

- Device ID
- Device Name
- Device Type
- User ID (Driver ID who last used the device)
- Last Used (through a date range from/to)

 **Warning:** Unknown costs for client/year (NHS/2014)

| Cost Details | | | |
|---------------------------|-------|-------------------|-------------------|
| Activity | Hours | Rate per hour (£) | Cost (£ Exc. VAT) |
| Requirements | 0.00 | 0.00 | £0.00 |
| Change Request Evaluation | 0.25 | 0.00 | £0.00 |
| Functional Specification | 1.00 | 0.00 | £0.00 |
| Technical Specification | 0.75 | 0.00 | £0.00 |
| Development | 2.75 | 0.00 | £0.00 |
| Testing and Release | 1.00 | 0.00 | £0.00 |
| Implementation | 0.00 | 0.00 | £0.00 |
| Project Management | 0.00 | 0.00 | £0.00 |

| | | | |
|--------------|------|--|-------|
| TOTAL | 5.75 | | £0.00 |
|--------------|------|--|-------|

Estimate excludes training, release to live and go live support.

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1 EST 333702 NHSBT Order Entry via Portal



STATEMENT OF WORK CHANGE REQUEST ESTIMATE

| | | | | | |
|-------------------|-------------|------------------|--------|------------------|-------------------------|
| Client | NHS | Project | DEV | Site | NH-ALL |
| Client Reference | CR-Feb16-01 | Aptean Reference | 333702 | Estimate Version | 0.1 |
| Prepared By | A N Walker | | | Estimate Date | 29/02/2016 |
| Invoice Reference | | | | Priority | 3 |
| Customer | | | | System Version | Portal: 6.X, CTMS: 11.X |

Client Request

Provide a facility for Internal Customer Order Entry and Hospital Collection Order Entry through the Portal, specific to NHSBT needs regarding assets.

Aptean Solution

The standard *CALIDUS* Portal Order Entry screen can be used to generate collections and deliveries. This screen is normally available on the Orders menu, called "TMS - Order Entry", although this is configurable in title as well as position. The requested use is predominantly for Stem Cell orders, but can be used to generate any order.

It is expected that this screen can and should also be used for Hospitals arranging collections of samples, although the Portal user group will restrict the type of data that can be entered.

The screen will be modified for the purposes on NHSBT. This will be controlled through the existing Portal Order Entry Configuration Window Type, with a new value "F", for "Fixed".

The first step prompts the user for all order header information.

Adding an Order - Step 1

This will be modified to remove the indicated sections:

- Collection Date/Time From and To
- Delivery Date/Time From and To
- Delivery Type (Service)

The Collection and Delivery address steps will not be modified, as both collection and delivery orders may be raised using this screen.



Adding Order Addresses

The user will be required to user to enter both locations and addresses.

It is expected that this will be limited via the Portal User Group to ensure that the user has access only to locations that are applicable to that user, to make searching for Collection and Delivery addresses easier.

A new step will be added between steps 3 (Delivery Address) and 4. This will allow entry of:

- Delivery/Collection Date
- Delivery type (Service), selecting from a drop-down list. This will default to Standard, but will allow the user to select Ad Hoc as well. No other options will be available. A restriction will be added to the Portal User's group, which can restrict the types to those that are applicable to that user group.
- Selection of standard route times for Standard type
- Selection of pre-existing trip times, or manual entry of collection and delivery dates and times, for Ad Hoc type.

 **Note:** If Ad Hoc is chosen, an alert will be displayed informing the user that they may be charged.

Examples:

If Standard type is chosen, a drop-down list will be displayed of all the fixed routes available for that location on the selected day. The user will be able to select one of those. When selected, the collection and delivery dates and times from the route will be defaulted into the collection and delivery dates and times on the screen. These cannot be changed.

If Ad Hoc type is chosen, a warning will be displayed to the user that they may be charged for this order. A drop-down list will be displayed of all the existing trips created for that location on the selected day, and a "Manual" option. The user selects one of the pre-existing trips. When selected, the collection and delivery dates and times from the trip will be defaulted into the collection and delivery dates and times on the screen. These cannot be changed.

If Ad Hoc type is chosen, a warning will be displayed to the user that they may be charged for this order. A drop-down list will be displayed of all the existing trips created for that location on the selected day, and a "Manual" option. The user selects the Manual option. The user may now enter collection and delivery dates and times from the trip.

The user may then proceed to step 4, where they may enter products to be delivered or collected.

First, the user enters the number of items, the container type and contents, selecting from the provided lists, as well as a number of items. Dimensions and weight will default once this is selected.

Container Type will allow selection of any DU type within C-TMS. A restriction will be added to the Portal User's group, which can restrict the types to those that are applicable to that user group. For example, for Hospitals, this may be restricted just to sample types.

To enter the item details against the line, the user will click the **Add Items** button against the line. The screen will be modified to allow the user to specify the Asset ID.



Adding Order Lines and Items

The Asset ID will be validated as being in the correct format for NHSBT, dependent on the asset type:

- For reusable assets, the Item ID must start with "8004".
- For non-reusable assets, the Item ID must start with "00".

This will also offer a lookup and matching facility, and will validate asset IDs for use at that location, and allow creation if necessary.

When updated by the user, the order will be saved in C-TMS, with the Asset ID saved in the appropriate place.

Note: It is expected that all labels in this screen will be checked once complete to ensure that no spelling mistakes exist.

Orders created in this way will drop into the C-TMS order well directly.

Any Standard orders on routes with pre-existing trips will be planned onto those trips automatically.

Ad Hoc orders will *not* be automatically planned and can be scheduled through the normal C-TMS trip planning screens.

Warning: Unknown costs for client/year (NHS/2016)

| Cost Details | | | |
|---------------------------|--------------|-------------------|-------------------|
| Activity | Hours | Rate per hour (£) | Cost (£ Exc. VAT) |
| Requirements | 0.00 | 0.00 | £0.00 |
| Change Request Evaluation | 2.00 | 0.00 | £0.00 |
| Functional Specification | 2.00 | 0.00 | £0.00 |
| Technical Specification | 0.00 | 0.00 | £0.00 |
| Development | 9.25 | 0.00 | £0.00 |
| Testing and Release | 1.75 | 0.00 | £0.00 |
| Implementation | 0.50 | 0.00 | £0.00 |
| Project Management | 0.75 | 0.00 | £0.00 |
| TOTAL | 16.25 | | £0.00 |

Estimate excludes training, release to live and go live support.

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2 EST 333703 NHSBT Portal Schedule Enquiry T2A Status



STATEMENT OF WORK CHANGE REQUEST ESTIMATE

| | | | | | |
|--------------------------|--------------------|-------------------------|---------------|-------------------------|--------------------------------|
| Client | NHS | Project | DEV | Site | NH-ALL |
| Client Reference | CR-Feb16-02 | Aptean Reference | 333703 | Estimate Version | 0.1 |
| Prepared By | A N Walker | | | Estimate Date | 29/02/2016 |
| Invoice Reference | | | | Priority | 3 |
| Customer | | | | System Version | Portal: 6.X, CTMS: 11.X |

Client Request

Add 'T2A Complete' status to the Portal Schedule Enquiry screen.

Aptean Solution

The *CALIDUS* Portal Schedule Entry screen (Order Type only) will be modified to allow some new columns to be added to the screen:

- A new 'T2A Status' column will be added, showing whether T2A has been completed ("Complete", "Partial", "Incomplete")
- A new 'T2A RAG' column will be added, showing a RAG T2A colour based on the following:
 - ◆ Green - if the T2A status is complete
 - ◆ Amber - If the T2A status is not complete and the order status is before En Route
 - ◆ Red - if the T2A status is not complete and the order is En Route

Note: Only this column would be coloured, not the whole line.

[illegible]

Schedule Enquiry showing new columns and parameter

These additional columns would be configurable as to whether they are added, by configuration against the Portal Group.

A filter at the top of the screen (rather than a column filter) will be added, to allow the user to select T2A Status through a drop-down list (Complete, Partial, Incomplete).

Warning: Unknown costs for client/year (NHS/2016)

| Cost Details | | | |
|---------------------------|-------|-------------------|-------------------|
| Activity | Hours | Rate per hour (£) | Cost (£ Exc. VAT) |
| Requirements | 0.00 | 0.00 | £0.00 |
| Change Request Evaluation | 1.25 | 0.00 | £0.00 |
| Functional Specification | 1.00 | 0.00 | £0.00 |
| Technical Specification | 0.00 | 0.00 | £0.00 |



| | | | |
|---------------------|-------------|------|--------------|
| Development | 3.50 | 0.00 | £0.00 |
| Testing and Release | 0.75 | 0.00 | £0.00 |
| Implementation | 0.50 | 0.00 | £0.00 |
| Project Management | 0.25 | 0.00 | £0.00 |
| TOTAL | 7.25 | | £0.00 |

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3 EST 333704 NHSBT Default Time on Inter-centre Moves



STATEMENT OF WORK CHANGE REQUEST ESTIMATE

| | | | | | |
|-------------------|-------------|------------------|--------|------------------|------------|
| Client | NHS | Project | DEV | Site | NH-ALL |
| Client Reference | CR-Feb16-03 | Aptean Reference | 333704 | Estimate Version | 0.1 |
| Prepared By | A N Walker | | | Estimate Date | 29/02/2016 |
| Invoice Reference | | | | Priority | 3 |
| Customer | | | | System Version | CTMS: 11.X |

Client Request

Default the times of Inter-centre Moves when received from Pulse.

Aptean Solution

An issue exists within Pulse whereby inter-centre moves on BMVs are generated as separate orders, and also the collection and delivery times are not set appropriately. This is leading to planning issues within C-TMS, and forcing manual changing of delivery times onto the operation.

The C-TMS inbound order interface will be modified to check the collection and delivery dates of all inter-centre movements (i.e. where the From and To Location Types are RDC). In this case, the system will check for any fixed routes set up in the system that are appropriate for those locations. If found, the process will modify the times of these moves so that they can be automatically or manually planned without further manual intervention on the times.

The Order Type will be set to "I", and the Delivery Type changed to "Inter-Centre", a new delivery type in the system, to make it clear that these orders have been modified.

Warning: Unknown costs for client/year (NHS/2016)

| Cost Details | | | |
|---------------------------|-------------|-------------------|-------------------|
| Activity | Hours | Rate per hour (£) | Cost (£ Exc. VAT) |
| Requirements | 0.00 | 0.00 | £0.00 |
| Change Request Evaluation | 1.25 | 0.00 | £0.00 |
| Functional Specification | 1.00 | 0.00 | £0.00 |
| Technical Specification | 0.00 | 0.00 | £0.00 |
| Development | 2.50 | 0.00 | £0.00 |
| Testing and Release | 0.50 | 0.00 | £0.00 |
| Implementation | 0.50 | 0.00 | £0.00 |
| Project Management | 0.25 | 0.00 | £0.00 |
| TOTAL | 6.00 | | £0.00 |

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