memo

From interview

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| |  | | --- | | Macro Welding Supply |  |  |  | | --- | --- | | To: | Bonnie Ryan, VP | | From: | Old But Gold Development | | CC: |  | | Date: | 2019-05-13 | | Re: | Summary of information from interview. | |

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| - | We met with Bonnie Ryan, VP of Operations to discuss some details of the business structure and desired elements of the system project.  **Regarding Purchase Orders**   * When an employee searches a PO request, they should see a list with the pending ones first. They will also be able to see the closed ones. * They should be able to filter by date. * When the user selects one, they will be able to see each individual item with the current status: ‘pending’, ‘approved’, or ‘denied’. * The submitting employee can make changes to an item while it is in the ‘pending’ state. * Items can not be deleted, but they can be indicated ‘no longer needed’ – the quantity of the item will be reduced to zero and the total amount will be updated accordingly. * Supervisors can approve or deny some items without completing and ‘closing’ a PO. The employee will not see the decision(s) until the entire PO is ‘closed’. The employee will no be able to change an item that the supervisor has already decided on. * Supervisors can change a quantity of an item and approve it. They must give a reason for this. * When a supervisor looks in the system for pending PO, they will see the oldest first, but they are not obliged to process the oldest first, or in any particular order. * The supervisor can filter the POs by date or by employee. * The purchasing dept. will not receive a notification of approved items. They will look in the system for new approved items daily. |
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|  | **Regarding Employee Information**   * The employee directory will be a scaled-down, public directory of contact information – just work email, work phone, and office location. This will be searchable by all employees. * Only HR will have the authorization to see all other info saved in the system and make any changes. * The employee can see their own info and change their basic info like home address and phone. * The system should also include a photo of each employee as part of their record.   **Regarding Pay System**   * The Supervisor of Finances will be prompted on payday (every second Friday) to run the payroll system. * He/She will have to put in a password to do so. This password will also be known by one other executive of the company in case of emergency. * If this password is entered incorrectly 3 times, the system will be locked down until reinstated by the IT dept. A notification of this lock-down will be sent to the Supervisor of Finances. |
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|  | Thank you for your time today. Please feel free to contact us at any time for questions or clarification. |
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