

Project Briefing

Updated: July 19, 2017

Organization: Coast Capital Savings

1.0 Business problem and project summary:

Coast Capital currently utilizes contractors to augment staffing levels when project demands are high. The contractors can be sourced from various avenues including agencies, partners and individuals directly. These individuals are not captured in the HR system and often manually maintained in various spreadsheets. A system that maintains history is needed help trend usage and manages future needs.

2.0 End User Interface:

The system will be a browser based system access online smart-form that allows users to add/change/delete contractor records. The Coast Capital Savings browser standard is IE 11 and small pockets of users are Firefox users. The user authentication will be via a simple userid/password mechanism outlined in the administrative section of this briefing.

3.0 Data

The data to capture per contractor is as follows:

Tombstone data: First Name, Surname, agency source, status = active/inactive, rehire=Y/N

Skills Category: <1 of 10 user free format fields with various pull down as aides>

Database: SQL Server, Oracle, Informix, DB2 etc

Languages: Java, C#, C+, Python etc

Certifications : PMP, ITIL-Foundation, etc

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Others :

For each contractor, they may have one of many engagement contract that capture the following:

Start date

End date

HR pay grade equivalent: (number letter from a pick list)

HR position role: from HR table (ie: ITG – mainland – role)

Cost Centre: <pick list>

Reporting Manager: <pick list>

Terms/PO number

Project Name

Rate Type: monthly, hourly or daily

\$ rate:

Currency: pull list USD, CAD

Time and material terms

Allowance expense daily per deem.

Charge type: Capital - Depreciated, operating costs (2 choices)

Main skill for engagement

Original documentation ie: statement of work (scanned): PDF file (link).

Notification for contract termination: number (non mandatory field)

Resource provided:

Phone= Y/N

Remote token = Y/N

Building pass= Y/N

Notebook = Y/N

Desk location = Unique number system (ie: KGS-0001). First digit is the floor. Override capability until we know Victoria standard.

Others: free field

4.0 Administration

Due to the sensitive nature of the data, the system is only available to selective members of the management teams. As a result, a simple userid/password to gain access to the system is required. Passwords will require complex validation (ie: upper case/lower case/numeric/special character etc). The administrative function has an ability to unlock users as well as a reset method to avoid complete lockout to the system.

Maintain the contractors records

Maintain tables such as Skills table

Maintain a FX table

Maintain HR pay equivalent table

Maintain HR role table

Maintain list of hiring manager

5.0 Reporting:

The following are on demand reports available:

1. Number of Active contractors (filter on today's date or a future date)

List the relevant contractor tombstone information and relevant engagement information.

2. Contractor costs. Filters for the report include date range, Project name, Cost Centre

List the relevant contractor tombstone information and relevant engagement information.

3. Trending report on the number of contractors per month. Filter of report by date range, agency source, cost centre and hiring manager option.

Reports illustrated in tables and bar graphs

4. Trending report on the Cost of contractors per month. Filter of report by date range, agency source, cost centre and hiring manager.

Reports illustrated in tables and bar graphs

- All reports are in CAD (converted from USD as necessary)

Stretch Goals:

- Allow this system to be segmented and used by any Cost Centre at Coast Capital. This means adjusting userid/password to allow access to data based on Cost Centre (captured in tombstone data). Reports would be limited to the data available to be seen for the cost centre administrator. A Super administrator would need to be created as an override in case data needed to be backed up/restored etc.
- Reports: Expiry report
 - (filter by a date)
 - 60,90, 120 aging report
- Scenario planning (what-if). What if we extended a contractor? What if a project is delayed for 6 months, what are the costs.

Proposed Technology:

Javascript, Java or C# development language

MySQL Server backend (Coast Capital is a SQLServer environment)