Final Report

a. A cover letter: The final report should be presented to your client, together with a cover letter thanking the organization for assistance. You should provide your project supervisor a copy of that report together with a 1 page single‐spaced summary of your reflections on the project and the major things you learned from it.

b. A table of contents

c. An executive summary

Stakeholder Needs (Mission Vision)

Project Description

Scope

Key Inclusions

Key Exclusions

Key Regulatory Impacts

Key Assumptions and Constraints

Assumptions

1.

Constraints

1.

Functions and Features

Functional Requirements

For better readability, related functional requirements (FRs) are grouped into their respective functional groups (FGs).

Function Group Title FG 1

FR 1.1 Feature/Function Title

Owner

Priority

Critical / Desired / Non-Essential

Requirement details

Additional Information

TBD Items

FR 1.2 Feature/Function Title

Owner

Priority

Critical / Desired / Non-Essential

Requirement details

Additional Information

TBD Items

Non-functional Requirements

NFR 2.1 Feature/Function Title

Owner

Priority

Critical / Desired / Non-Essential

Requirement details

Additional Information

NFR 2.2 Feature/Function Title

Owner

Priority

Critical / Desired / Non-Essential

Requirement details

Additional Information

d. Description of the business

e. Description of the current process and the system

f. Problems noted

g. Alternatives considered

h. Recommendations, and details of the chosen alternative

i. Appendices

Interim Report

a. The Business and System Under Study.

Sauder School of Business

Sauder School of Business is a faculty at the University of British Columbia. The scope of the business is very large including various activities. Our project looks into the staff division within the business specifically in the process of hiring and exiting employees at the faculty. After reviewing the business with the business analyst in Sauder, we found many of the complaints regarding the communication between each department within the IT, Admin, and the HR department.

The Hiring and Exiting Process

During the hiring and exiting process, related managers and directors need to fill out a form and send it back to the Administration team. The Administration team then sends the forms to the required divisions such as IT and HR for the required parts in the form to be activated or deactivated. Thus, there are 3 copies of the same form; one in Admin (main one), one in IT, and one in HR. These forms are essential because it is the only way an employee can start any activity such as: getting access to necessary rooms, keys, laptop, email, printer, parking etc. Thus, without these forms filled in, it is impossible to keep track of staff, and their individual needs.

Currently, each department receives a monthly notice regardless of hiring or exiting of an employee, reminding them the forms they are required to fill and submit. However, the person who is responsible for filling the forms in each department changes every time creating an inconsistency in the process.

From the perspective of the Administration Team: The Administration team assumes that they will receive a form (either entrance or exit) from the different divisions every month. Afterwards, they check if all mandatory fields are filled properly and send the form to Sauder IT and HR. Admin assumes they do their part and no other verification is done. For their roles in the form (voice, phone activations etc.) it takes them an hour maximum to complete the tasks. However , they are also dependent on UBC IT for these parts since they are the ones who physically set up or take off the voice, phone etc.

They record the forms in one place, the drive which syncs electronic copies yearly. Other than this, they do not have any other kind of database where they keep every personnel’s records. Lastly, they act as a middleman between the new employees or managers and IT since, if someone directly goes to IT or HR for an access request, these two departments (IT and HR) cannot process without going back to Admin.

From the perspective of Sauder IT: When IT team receives the form via email from the Admin Office, they instantly create a ticket for the form (for that person) and assign different teams for specific tasks such as: grant email access for team 1, grant desktop and shared networks for team 2, and grant web (site core) accesses for team 3 relatively. When the last team who is responsible for his part completes his part, they close the ticket and there is an automated notification that goes to Admin as soon as the ticket is completed and closed.

In the case of a walk-in of a new employee or prospective exit to an IT office, they inform them about the form they need to fill, get the responsible manager’s approval, create a ticket under their name and put the tickets together when the complete form comes from the Admin office.

In order to observe better and provide a visual summary to the above information, a rich picture for both exiting and hiring processes, and a swim-lane data lane diagram showing the each departments’ connections can be found in the appendices under ‘figure 1.0’ and ‘figure 2.0’.

PUT MORE EXPLANATIONS REGARDING WORK SYSTEM SCOPE (ALTER’S BOOK PGE 33-34)

When deciding our work system’s scope, first of all, we identified our main problem; “inefficient and unorganized workflow order during the hiring and exiting process at Sauder School of Business.” For purposes of our analysis, we had to analyze the subsystems within the work system of when someone got hired or exit might extend from the approval of that person’s on-boarding to the point when that employee leaves the faculty. Thus, our scope would include the subsystems otherwise it would have been insufficient to isolate and analyze the administration team alone. For our project, defining administration office’s work system as the smallest with problems and opportunities would be the most acceptable. The outputs would include the entering & exiting forms that they provide to others teams in order to keep track of the process. Moreover, the inputs would include the received forms from various other teams with the correct information to take the action on their side.

b. Problems and Requirements

Throughout our interview process with various departments within Sauder School of Business such as; Admin office, Sauder IT and Information Systems, we came across with different interpretations of similar concepts and high volume of assumptions between the departments. As it can be also seen from the diagram in the appendices, there is a dependency between the departments and it should flow very well in order to solve the main problem of our project. Some of the main problems that we have identified are:

Miscommunication and insufficient communication between the departments

Lack of standards or policies in order to come up with a general rule for different exit/enter cases

Huge assumptions that are being made between the divisions regarding their responsibilities

Lack of training for current staff (managers, supervisors) regarding this process

Problems with keeping the files up-to-date / updating them regularly

A form can that an hour to complete. This is usually be done by one employee every time, and requires committing a lot of resources during the workday, especially during peak seasons where there are newcomers and resignations.

There is a huge learning curve for administrative staff to handle the form, it takes months for one staff to learn the process thoroughly.

PROJECT CRITERIA

Great understanding of the capacity of each division, especially the admin office, in order to keep the recommendations within their scope

Good understanding of the staff roles and responsibilities in divisions to obtain an efficient big picture (rich picture)

A well identified and detailed workflow analysis in order to address the specific responsibility for each division

Identification of the key personnel in every division who will later need to be trained (drop-in sessions) on this particular subject and be responsible for filling and sending out the forms

Thus, basing on the above problems, some of the requirements are:

Functional

Adoptability

Through the provision of a trusted data structure that will encourage users to rely on.

Flexibility

Through the provision of the ability to extract specific CV components/sections on demand.

Portability

Through the provision of the ability to import and export a complete set of individual’s CV data.

Scalability

Through the provision of a cross-platform data exchange mechanism that allows for future expansion of the system as well as integration to other systems.

Non-Functional

Simplify the form so that the learning curve is lower for administrative staff, and multiple employees can work on different parts of the form to maximize efficiency = NON FUNCTIONAL REQUIREMENT

c. Recommendations and Alternative Solutions

Recommendations

A well-designed workflow system to find the bottleneck, find out the participants, roles and responsibilities

A standard policy for the exiting employees. defining for each status of people (student, full time, part time, manager, director etc.), how long their email should be stay activated, and when to deactivate them. - Explain more about the policy

Training/creating drop-in sessions for an employee (assistant, receptionist etc.) from each division to understand this task clearly when a hiring or exiting process take place in their department

Alternative Solutions:

Create a Shared Network

The first option is setting up a shared network between the Sauder IT, Admin Office, and HR department to replace the current email system. This new system will reduce the chance of misplaced forms between emails and create an efficient way of data flow management. To achieve this, one possible solution would be to move the form to a web-based form so that there would be an automated data entry in a database created after each submission. Any updates or edits applied by either IT, Admin, or HR would be seen by all other departments. Keep in mind that it will be important to manage who gains access to edit, update, or delete such entries and that this option may have high costs. Many might also dislike the idea of a new digitized system.

Improve Current Forms

Admin should put several more fields in to each form for reduced confusion and inconsistencies. Some of the recommendations included: version number of the form, current date, and the applicant’s personal email address. With a personal email address the IT office can reach out to these people if they needed to. Moreover, to provide consistency, the IT related sections in both the entrance and exit form should be formatted in the same way. In the exit form, there should be a field added asking for the desired duration of the email account to stay activated. This option has relatively low cost and low risk and does not require training unlike the previous option.

Maintain Status Quo

The last option is to do nothing. There is a bottleneck to the system only during peak seasons when there are many employees joining or leaving. Although inefficient, when there are non-existent employees, they can be removed from the system easily. The inconvenience is minimal. However, we do not recommend this option because of its inefficiency during peak seasons and for current security issues.

d. Project plan

A table with milestones that will show individual responsibilities

Task

Dates

Members

Interview with Ambrose and AlaN (Business ANalysts)

10-Feb

All

Interview with Linda (head of Admin Office)

12-Feb

All

Interviewing the staff in Admin Office and Sauder IT (Kenneth)

17-Feb

All

Walkthrough and review process onsite in Admin

March 2-3

Beyhan, Alex

Walkthrough and review process onsite in SAUDER IT

March 4-5

Christine, Miguel

Team meeting for recommendations

6-Mar

All

Prepare draft of formal plan for decided recommendations

March 7-9

Alex, Christine, Miguel

Draw before-and-after BPMN diagram

March 7-9

Beyhan

Meet with Alan and Ambrose from BA and get feedback

10-Mar

All

Prepare formal plan for using a web form

March 11-14

Beyhan, Alex

Produce mock-up web form for presentation

March 12-14

Miguel

Draw before-and-after BPMN diagram

March 12-14

Christine

Meet with Alan and Ambrose from BA and get feedback

17-Mar

All

Team meeting for presentation and duties breakdown

March 18-20, 23

All

Presentation

March 24-April2

All

Team meeting for final report and duties breakdown

30-Mar

All

Final report due

9-Apr

All

… or this one

e. Appendices documenting the findings (diagrams, charts, etc.).

Figure 1.0 : Showing the rich picture for the current state of hiring and exiting processes

Figure 2.0 : Showing current state of hiring and exiting processes and the data flows between the entities via the swim-lane diagram

more detailed info on the task? what do u mean by task?

Challenge: Keeping track of the Sauder staff;s (part-time/full time) on-boarding and exiting data

Person’s email stays in the system even after the leave

Change in departments/faculties create security problems (access levels)

Interviews:

BAs: Alan and Ambrose

IT: Kenneth Wong

Admin: Linda Tommasini

Alex and Ambrose 2nd meeting:

lack of training and orientation

know the form dont fill out

know it dunno how to fill

dunno about the form at all

forms are not updated enough

so many changes going on

email problem - usually when they change the departments (recommend a standard - policy) : could be a point in the exit form

draw diagram to define the goals - the permissions

assumptions flaws

they have a sharepoint right now - can build on

hr: payroll and tax forms

still building the sites for each division

1- Draw process diagram

2- Go back check

3- Business mapping: As is (current) vs To be(improvements) -> show these in class during the presentation

4- Find the problem statement (potential improvements)

5-To be diagram

6- Keep all our versions - to show our progress

Work System Snapshot

Current concerns

Wrong/incomplete information being filled out - having to notify the manager of that department

No confirmations of anything being completed

Requirements

Functional requiurements

central data storage for concurrent users

enforcement of filling

Non-functional requirements

Alternative one - Do nothing

Benefits

Costs

Alternative two - PHP + MySQL

Benefits

- Ensures

-Can be accessed by everyone concurrently once the form is filled in

-

Costs

Implentation

Risks:

Transfer errors

Security?

-User friction with technology

Implentations

Alternative three -

Do a reinfrorcement