

InTouch Consulting Elicitation Notes for BreadDev

This is a summary of the topics discussed in our first client meeting with the client representatives of BreadDev on Jan. 29, 2019.

Schedule Design and Functionality:

- In the RFP from your company it explains a real time representation of the schedule, can you further explain this?

Schedule needs to have up to date changes and live real time updates when changes are made or edited in any way. If schedule was checked at any time after the change, it will be accurately reflected.

- What should the layout of the schedule/calendar roughly look like?

Weekly calendar/planner Monday to Sunday, with time slots for each person scheduled. Simple and intuitive calendar for the average non-technical person. Colour coded blocks to correspond with employee positions for the shift.

- Can you further explain the customizable schedule templates?

No need for each staff member to design/change the theme of the schedule template. Schedule will only be edited by management.

- What are the main devices that this system will be expected to run on?

Must run on in office PC as well as any devices staff will use outside of the office as well as mobile. A web application would work for this.

- In regards to the system organization, are supervisors and bakers in the same schedule? Are CEO and CTO scheduled? Are they in the same schedule as the supervisors and bakers?

Everyone on the floor should be in the same schedule. No need to schedule CEO's or CTO's. People listed in the schedule will include sales staff, bakery staff, and supervisors/management.

- Should there be different interfaces/account versions for management/employees and how should they be different?

Employee account should be a subset of a manager's account. It will be the same interface however, the manager's account will have editing abilities and access to accept changes/monitor shift summary.

- Should the employees only see their schedule and not other employees?

Employees should be able to see everyone's schedule and accept available shifts.

Notification Systems:

- Should there be a live messaging system?

No need for live messaging system between employees. Just a forum/announcements used by management.

- In regards to the forum specified in the RFP: should all employees be allowed to post, or will it function more as an announcement feature?

It will function as an announcement system/board for all workers, used only by management. For example, will notify all employees when there are holidays or staff meetings.

- Should messages between coworkers be visible to management?

No messaging system required.

- Are employees responsible for trading shifts? Will employees be responsible for contacting managers to request a shift trade?

Employees should be able to mark their shifts visibly as available/needs to be covered and have a system where another employee will be able to accept the shift. Once shifts are accepted by both employees a notification can be sent to a manager to have final acceptance on the changed shift.

- What kind of warning system/notification system for overtime scheduling and changes in shifts?

Notifications for managers to approve/decline of shift changes. Manager's will also receive warning notifications for when an employee has reached overtime that week.

Notifications can be introduced with an automated email system where proposed shift changes, accepts/declines and announcements can be easily distributed. Employees should have options to opt out of these emails but must receive manager announcements.

History and Tracking:

- Should there be a way of tracking vacation/sick days?

Vacation and sick days can be visibly marked in the schedule by management. Taken into account for tracking of hours.

- Additional notes?

There should be a summary of weekly hours for each employee. Past weekly schedules should be stored up to the past year. Employees will sign up with personal email and have an option to add information into a contact profile.