Criterion E: As in Evaluation

Feedback:

I walked my client through how the program works and then we discussed the database itself.

Spencer:How was the program?

Gary Kinsella:It was good. There are just a few things I would change and add. For instance you show "Date" and it would be good if it was "Date of closing" for clarification.

S:Ok. That makes sense. Anything else.

G:Yes. I would also like to add something to what it shows when you represent the bank. Will this be Okay to do?

S:Yes that is fine. What should I add.

G:The bank's name, this should also be done if you represent the buyer. Also an e-closing file number as this is something new, since we last talked. A loan processor would be nice aswell.

S:Perfect. Anything else?

G:Can you also add another phone and distinguish between cell and office phone? Also 2 lawyers would be nice, one for the buyer and the seller. Can you also add a refinance category?

S:Sure I can do all of that! I did wonder if you wanted me to have it save every time menu 1 is shown?

G:That makes sense as not saving can be a pain.

S:Sounds good. Thanks!

G:Thank you.

Evaluation:Success criteria from A.

Add Files:This was met, can add files. Shown in D

Search:This is met but does not meet standards. After searching part of the database is deleted. Working on solution. Shown in D, client is aware.

View all categories:This works as client can see all categories representing a particular file.

If representing bank, add loan officer: Met. Also shows the loan officer when needed. Approved by client.

View Files:Met. Shows before menu 1. Shows in D and with client.

Sort:Met. Sorts in any way. Shown in D.

Recommendations:

The client recommends clarifying some terminology. The date should be Date of closing, not just date. The file location should be such and not just location. Another simple recommendation was to have the database save at frequent points to not lose data accidentally.

The client also asked to add more phones and more lawyers. This will help him follow his current technique of information gathering. Also asked to add somethings if representing the bank. This includes an e-closing number, a loan processor, and the bank's name.

The client also asked about the possibility of adding refinances that require different information and are not "normal." This could be implemented into the current database with some work. However, I feel it would be easier to make a separate database for these refinances, or at least separate the two within the single database simply for usability and lack of clutter.

Word Count: 461