INFO8146 Issues, Requirements and Schedule for Practical 1 Part 1

As your Senior DS for this Project, I am writing this document to convey important issues and requirements of your work for this Project. Also, a Work Schedule with Effort Estimates and Maximum Session Marks are on the last few pages of this report.

This list of needs replaces any previous lists of issues and requirements that you have received.

This is the complete list of issues and requirements for your project work, as of the date of printing. Written communications between your team and your professor / Senior DS after this date regarding any one of the items below are to be considered as applying to your project work as well.

These are the issues that the business has been able to identify as of now.

Issue		Details
1	Possible contracting to provide Call Centre services	You are a Data Analyst working for a Call Centre Outsourcing firm. There is a potential client, who has been running their own call center for several years. The potential client has two different business divisions. Your management needs analysis of data supplied by potential client, so that they can decide if it's worthwhile to quote on providing services.
2	Call Centre Data and documentation from the Potential Client.	The potential client has supplied documentation about the call centre processes. They've also provided tracking data from their current digital PBX (phone system). The potential client also started doing chat support a while ago.
3	Sales Manager needs …	Your Sales Manager needs a list with descriptions of various call centre roles. Also, a diagram (or diagrams) of the roles and their interactions is needed.
4	Sales Manager needs …	Your Sales Manager needs a list with descriptions of various interactions between the call centre roles. For each interaction, a freeform description of the work, including decision(s) involved and logic, is needed.

Below is a list of Professor's requirements, at minimum, that your team of 1 must perform and/or deliver.

Requirement		Details
1.1	*List of Deliverables*	*This project will not require you to build and update an Excel Sheet with a List of Deliverables. In INFO8135 Week 2, you will be learning about, and implementing, the List of Deliverables as your primary project/work management tool.*
1.2	*Ignore Week 1 Workbook Content*	*The Week 1 Guided Assignment was designed to introduce the work of identifying actors, and interactions. In Week 1, you were given documentation and data about the OHT Call Centre. In Week 2, you must NOT use any documentation and/or data from Week 1. However, you will be using the general principles from the Week 1 Guided Assignment.*
1.3	Review Issues and Requirements Doc	Review Issues and Requirements Document. Understand that the Issues are NOT what each person and team uses to manage their work. The Requirements ARE what must be done, and have marks!

Your Senior DS has done some work scoping for you. Below is a list of requirements, at minimum, that your team of 1 must perform and/or deliver.

	Requirement	Details
2.1	*About the Call Centre Processes document.*	*Most DA projects will start with the DA (data analyst) receiving information about the people / roles / organizations involved in the business system to be studied. The most important type of knowledge needed at this time is descriptions of the work processes of the system.* *Many times, the DA must get this information from BA's (Business Analysts), SME's (Subject Matter Experts), or the managers and workers of the system.*
2.2	Quickly read the Call Centre Processes document.	Research the different roles in the Potential Client (PC) Call Centre. Start this by reading the entire document with the goal of knowing its sections, and what knowledge is in a typical section.
3	Print the I&R document	Print the I&R document's Issues and Requirements sections. You do not need to print the Work Schedule.
3.1	*Why Print the I&R document?*	*Each of you are working on your own computer, with its 13", 14", 15" or sometimes 17" screen. You will have an easier time of doing your work if the I&R is printed; it gives you the equivalent of a second screen on your computer!*
4.1	Build the Empty List the Actors	Start a new Excel workbook. Rename the first Excel sheet to be "Actors". In Row 7, create a list's headings with "ID number", "Actor Name", "Actor Group", "Notes" and "Source of Knowledge" columns.
4.2	*ID # column*	*This column will have number or letter codes that you create. Each code must be unique. It will be the list's primary key.*
4.3	*Actor Name column*	*This is the first knowledge that you will put in this list. You will get the knowledge from the Call Centre Processes document.* *Hint: You should look at the Group types below to help you search.*
4.4	*Actor Group column*	*This is the next knowledge that you will put in this list. You will decide, for each actor name, if the name is a:* *- Person - Role / Job Title - Organization* *- DataBase - Knowledge Base - Foreign System* *Then, you will enter the appropriate term in the Actor Group column on the row with the actor name.*
4.5	*Actor Group column - Divisions*	*[Optional - for superior marks] The Call Centre has two divisions, and each has similar roles. You may create a second Grouping column and record the Division with which the Actor is connected (not all actors are connected to one division).*
4.6	*Notes column*	*Every list that you create must have a "Notes" column, but it will mostly be empty. This is for knowledge that must be in the list that doesn't fit in other columns.*

Requirement		Details
4.7	*Source of Knowledge column*	*In this column, enter the Page # and the Section number, from the Call Centre Processes document, of the Source of the Knowledge for a particular Actor.* *You must not "summarize" the knowledge about the actor. It's already written in detail in the Call Centre Processes document. Just provide a "pointer" to the exact place of the knowledge.*
5.1	Build the List the Actor Types	In "Actors" Row 7, starting at column G, enter the Column Headings "ID" and "Actor Types". From the Week 1 Guided Activity, find at least 6 different types of actors. Put their "type names" in this new, 2 column list.
5.2	Review pptx Slides 15-17.	Review Week 2 Powerpoint Slides 15, 16 and 17.
5.3	Find and List the Actors	Read carefully thru the Call Centre Processes document. Find Actors of different types. Enter their names, types, page number and section number into your Excel "Actors" sheet's "List of Actors". Stop when you've found 20 Actors, or cannot find any more.
5.4	*Quailty Control Check*	*Are the Callers one of the Actor/Roles that you've listed?*
5.5	Enter a Reference to the Source Document	All your knowledge has come from the Call Centre Processes document. So, enter the full name of the document in a cell in rows 5 or 6, and some other wording to tell readers of your work that this is the GENERAL source of the knowledge.
6.1	*Prepare to find and list Interactions*	*Now that you know many of the actors, it's time to list some of the interactions between the actors. Interactions are a shared activity that two or more actors do together. For example, the Caller and the Receptionist/Greeter interact when the Caller's phone call is accepted/answered. Their interaction is a conversation, and the outcome of it will be that the caller is passed on to other Call Centre Roles.*
6.2	Review pptx Slides 18-20.	Review Week 2 Powerpoint Slides 18, 19 and 20.
6.3	Discuss with your Senior	Unsure of this Interactions Concept? Talk with your Senior about this.
7	Start the Interactions Sheet and List	Start an Excel sheet called "Interactions". On it, starting in Row 7, put the column titles of "ID number", "Interaction Name", "Brief Description", "Actors Involved", "Notes" and "Source of Knowledge" columns.
8	Find and List the Interactions	Determine the different interactions involving the roles in the Call Centre Processes document. Record knowledge on the Interactions in the Interactions List. Stop when you've documented 12 interactions. Stop when you have 8 to 10 interactions listed (there could be more than 30 listed!)

Requirement		Details
9	Save your Excel Workbook	Save your Excel Workbook.
10	Diagram the Interactions	Using Visio, or something similar, diagram 8 to 10 actors (no more!), and the different interactions (maximum of 10, minimum of 5) between these actors. Add documentation about where you found this knowledge, and where the related lists are, on this diagram.
10.1	*Expected Features of the Diagram*	*Your diagram must have a title block, actors graphics with names and ID numbers, interaction graphics with ID numbers and brief descriptions, and a block of text that refers to the related Lists.*
10.2	*Submit Format*	*Please submit your diagram as a separate Visio file, or embedded in a third sheet in your Excel workbook.*
10.3	*Apple MAC computer?*	*Using a MAC system? You will have to use a College supplied Azure Virtual Desktop, or the older remote access PC, to get Visio. You will also use this to work with MS Access. Start from the Conestoga IT Home Page (it.conestogac.on.ca).*
11	Better describe the Interactions	[Optional - For superior marks] Add 2 columns to the interactions list - "Actions" and "Decisions". Format these columns to allow multiple lines of text. Get data for TWO Only interactions for actions/work description, and the decisions involved, and enter it into the expanded list.
12	Async work Before Week 3 Session	Record and submit a short (2-3) minute video that introduces yourself to your Professor. Please tell the what you hope to gain / achieve / receive from this course; how you will decide that this course is a success for you. Also, please tell them how to properly pronounce your name.
13	Submit your work to Econestoga on time	Submit Excel Workbook and other files to Econestoga Assignment - Practical 1 Part 1 by due date and time. Your video is submitted to the Assignment "Video of Introduction". Make sure that each have appropriate file names.
16.1	*Late Submissons Guidelines and Policy*	*The Guidelines for Submitting Assignments and Late Policy of the Business Analytics 1521 Program applies to this assignment. Generally:* *1) Extensions must be negotiated at least 24 hours in advance.* *2) Late submits - 1 calendar day 20% penalty, 2 calendar days - 40%* *3) Submits after 3 days are not accepted, giving a grade of 0.* *See [Business Analytics - Program Handbook (conestogac.on.ca)]*

*** This sheet of paper does not need to be returned to the Professor ***

Work Schedule

ID	Requirement	Details	Estimated Hrs	Maximum Mark
Week	Wk02			
1.3	Review Issues and Requirements Doc		0.1	
2.2	Quickly read the Call Centre Processes document.		0.2	
3	Print the I&R document		0.1	
4.1	Build the Empty List the Actors		0.1	
5.1	Build the List the Actor Types		0.15	
5.2	Review pptx Slides 15-17.		0.1	
5.3	Find and List the Actors		0.5	
5.5	Enter a Reference to the Source Document		0.1	
6.2	Review pptx Slides 18-20.		0.1	
6.3	Discuss with your Senior			
7	Start the Interactions Sheet and List		0.1	
8	Find and List the Interactions		0.5	
9	Save your Excel Workbook		0.1	
10	Diagram the Interactions		1	
11	Better describe the Interactions		0.3	
12	Async work Before Week 3 Session		0.5	
13	Submit your work to Econestoga on time		0.1	
			4.05	**30**
				30

These issues and requirements are what I have as of now. I will update you if anything more comes forward.

Regards,
Your INFO 8146 Senior DS