Organization: Greater Washington County Food Bank

Partner: Jon Schubert

Team Members: Shalini Rao, Blythe Weng, Max Dunaevschi

Project advisor: Professor Barrett

[Project community partner meeting notes](https://docs.google.com/document/d/1GxIlVwTtsn3eNmL2yw0P6RYenS8n_-kTUpjP1brqUG0/edit?usp=sharing)

We walked through this [document](https://docs.google.com/document/u/3/d/15ebI5OD51tilyVFAFJ6mYFNceGSw24dsYnLmKRm_nvg/edit) with Jon for our meeting, and made bullet point notes for extra items that need to get done.

[URL to the team’s project plan (updated on a weekly basis)](https://github.com/mdunaevs/GWCFB/projects/1)

Kanban board on GitHub

Here's the repository just in case: <https://github.com/mdunaevs/GWCFB>

Date: 4/19/2021

Friday 16th Meeting Agenda:

1. Walk through the different functionalities’ documentation that we have been working on based on the list Jon sent us
2. Discuss outcomes moving forward - What do we want to come out of this with?
3. Answer any questions, take any more suggestions for functionalities to explore

Upcoming 04/23 Meeting Agenda (tentative)

1. Do a Zoom walkthrough of functionality we have figured out from the list sent to us
2. Present the cleaned documentation (realistic data) to Jon
3. Answer/take any questions about the software
4. Clarify expectations and target audience for training guides

Sources:

<https://www.gwcfb.org>

<https://www.foodhelpers.org/>

<https://www.pittsburghfoodbank.org/>

Time Split Overview

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Blythe** | **Shalini** | **Max** |
| Worked in Sortly to figure out each functionality Jon wanted | 3 hrs | 3 hrs | 3 hrs |
| Project Outcomes Discussion | 1.5 hrs | 1.5 hrs | 1.5 hrs |
| Writing documentation for each functionality | 2 hrs | 2 hrs | 2 hrs |
| Update project plan/sprint report | 1 hr | 1 hr | 1 hr |
| Create Client Meeting Agenda |  | 0.5 hrs |  |
| Kanban update |  |  | 0.5 hrs |
| Client meeting | 1 hr | 1 hr | 1 hr |
| **Total Hours** | **8.5 hrs** | **9 hrs** | **9 hrs** |

**1. Accomplishments Since Last Sprint**

Summary:

We were sent a list of desired functionalities from Jon to figure out using Sortly and we spent the last week working on documenting each of those actions to be used to train Jon and employees in the software.

* Worked in Sortly to understand how to execute the actions Jon wanted to be able to perform for the food bank’s operations.
  + Early in the week, Jon sent us an email with a list of functionalities he wants to perform in Sortly. We split these functionalities up between the three of us and worked to understand the steps necessary to complete each action in Sortly.
    - Vendor History functionalities - Blythe (1.5 hours)
    - Customer History functionalities - Shalini (3 hours)
    - Item History functionalities - Blythe (1.5)
    - Box Assembly functionalities - Max (3 hours)
* Documentation of functionalities and instructions for each step
  + Given the list of functionalities, we created documentation outlining the steps of how to complete the actions. We created dummy items and folders to be able to take screenshots of each step of the process. We compiled these screenshots with annotations and documentation into a single document, which we shared with Jon at our meeting. We plan on creating more accurate documentation in the upcoming weeks by using actual data. Thus, we will import the actual counts of items that are used by the food bank, and modify our documentation accordingly.
  + (2 hours: Max, Shalini, and Blythe)
* Project outcomes discussion
  + As a team we discussed our ideal conclusion for our project, using what we learned from class. On a high level we talked about the best practices, intermediate outcomes, and summative outcomes. We also discussed with Jon on what he would like to see from the outcome of this project.
  + (Max, Blythe, Shalini: 1.5 hrs)
* Create Client Meeting agenda.
  + As part of the PM role, Shalini created a client agenda which was sent to Jon the night before. This was very useful because it led to a more detailed discussion, since Jon was prepared with all the information we needed.
  + (Shalini, 30 min)
* Update Kanban Board
  + Update the kanban board to show our current and future weekly tasks. This is important in helping us stay on top of our tasks.
  + (Max, 30 min)

**2. Blocks and Problems**

Client

* Jon needs to change his current practices to work with Sortly. Sortly has a completely different database structure than QuickBooks, being more inventory based while QuickBooks is more accounting based. This means that Jon has to learn to work with a new software with completely different functionalities while still using QuickBooks until the data transition in June.
  + We are working on ensuring that we document every step of the process in a clear and easy to understand way to make it easier on Jon to learn. We have already added a lot of reference photos to our documentation and are thinking of possibly adding video walkthroughs as well. We also plan to organize the document in a way that is easy for Jon to search for certain functionalities if needed, making the learning process a lot easier for him.
* If there is no efficient way to complete an action in Sortly, the net gain from changing software for Jon will be nearly nonexistent.
  + We are working in Sortly to try to find even a workaround solution to make sure each desired functionality is possible.
* As mentioned last week, there is a transition happening in June and the inventory database will be moved after our time is up. Jon will currently be paying for two softwares but will only be utilizing one (QuickBooks) until the upcoming transition takes place.
  + Jon can time his free own trial so that he has time to set up the database without paying for it and then transfer the data when the transition happens in June.
  + We have established a rotation of who will sign up for the free trial so that we have more time to test the software and completely familiarize ourselves with the functionality before having to pay.

Team

* Restrictions of Sortly capabilities
  + From what we have done so far, it seems as if most of the functionalities are possible to complete in Sortly, but require some workaround and unconventional manipulation of the software. There have been a few functionalities that Jon has asked for that we have not been able to find a solution for yet. We are contacting customer service to understand more about the software to see if there is a solution that we could not find ourselves.
* Limitations for the rest of project duration
  + Since there is a transition in June, we are being asked not to fully transfer the data from Quickbooks. We were given a sample inventory so that our documentation will be an accurate representation of what the database will eventually look like, but we are limited to only working with hypothetical data and documentation for the rest of the project.
* Time management for the end of the semester
  + Since we have other classes with projects and exams coming up at the end of the semester, we are concerned about making sure we can keep up with the work while being able to keep questions for the 7AM-3PM time range that Jon is available. Most of us work during the evenings when we are unable to contact him, so there is often a delay of 1-2 days in getting questions answered.

**3. Goals / Targets for the Next Sprint**

Summary:

Next week our goals mainly focus on updating the data within the Sortly software and update our existing documentation so that it is more accurate with how the inventory actually looks.

**Priority**

* Insert the inventory data into the software (Max, Blythe, Shalini, 3 hr each)
  + We want to insert the inventory data into the software so that we can create accurate documentation and test to see if any limitations exist within the software. We plan on taking the existing inventory data from Quickbooks and creating instances for the information in the software. This will also allow us to find the best way to complete the actions (since with more data we might change how we initially did something). Work will be split up so that each of us takes a ⅓ of the inventory data
* Update the documentation for the software (Max, Blythe, Shalini, 3 hr each)
  + We plan to work on updating the documentation for the Sortly software. Currently we have written descriptions and images. We are planning to add in videos showing the step by step actions on how to do certain things within the software. Since we will not be available for support or maintenance after the project is done, we need to be sure he is satisfied with the solution he chooses and can get help if necessary on his own. This will help the client know how to do certain actions, as well as being able to distribute this information to other workers that might use the software. Furthermore, when we are no longer working on the project they can always go back and check the documentation if they do not remember how to do something. Currently, our documentation uses made up data values that we used for testing purposes. We are planning on importing GWCFB’s actual inventory and modifying the images in the documentation. This will result in more accurate documentation, as it will more closely reflect the actual inventory.
    - Vendor History functionalities - Blythe (1.5 hours)
    - Customer History functionalities - Shalini (3 hours)
    - Item History functionalities - Blythe (1.5)
    - Box Assembly functionalities - Max (3 hours)

**Admin**

* Update Kanban Board - Since we will have a final solution that Jon has decided on by early this week, we can shift our efforts to building out the solution for Jon to populate with his own data. (Max, 30 mins)
* Create client meeting agenda - This was a successful task from last week that helped focus our meeting with Jon and made it more effective and efficient. (Shalini, 30 mins)

**4. Community Partner Relationship**

We have consistent weekly meetings with Jon Schubert where we ask him questions to help us gain a better general understanding of how the technology of his organization works and what he wants implemented/changed with the system. We have a good relationship with Jon as we meet and communicate on a regular basis with him. He has also been extremely helpful with answering any clarifying questions we may have and is quick to respond to any emails. Lastly, we have established common ground with him that his available hours are from 7am-3pm on week days and make sure to schedule meetings, send emails, etc. during that period of time.

We focused on understanding the Sortly software functionalities that Jon wanted us to find out and presented them to him during our last meeting. He thought the walk through demo was easy to understand and we plan on finishing up all documentation by this week.

Metrics:

Meeting 10/10 - We presented the Sortly functionalities Jon asked for in our last meeting with him. We shared the current documentation we have down and walked him through how to complete each task through screen share. He seemed very satisfied after we showed him these functionalities.

Responsiveness 10/10 - Jon is fast at replying to any questions we may have between his work hours, so we make sure to get any emails to him in that timeframe. (7am-3pm)

Productivity 10/10 - We create agendas for our weekly meetings so we have a set plan of what we need to discuss. Jon is aware of the plan for the meeting beforehand and comes with information prepared if it’s needed.

Clarity 10/10 - We have nailed down all of the functionalities that Jon wants out of the new solution. After our meeting last week, there is no longer any wishy-washiness on our next steps. There is a clear plan on our next steps and what needs to be done for the rest of the semester.