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 updated this [document](https://docs.google.com/document/u/3/d/15ebI5OD51tilyVFAFJ6mYFNceGSw24dsYnLmKRm_nvg/edit) with other functionalities Jon asked about during our meeting on 4/16

[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: 4/26/2021

04/23 Meeting Agenda

1. Do a Zoom walkthrough of newly documented 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 to figure out new Sortly functionalities Jon asked about | 2 hrs | 2 hrs | 2 hrs |
| Called Sortly troubleshooting to understand customer history functionality | 0.5 hrs |  |  |
| Editing existing documentation | 0.5 hrs | 0.5 hrs | 0.5 hrs |
| Adding new functionalities to documentation | 1 hr | 1 hr | 1 hr |
| Uploading and working with GWCFB inventory data in Sortly | 2 hr | 2 hr | 2 hr |
| 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 hrs** | **8 hrs** | **8 hrs** |

Future Tasks Timeline:

1. Add any more documentation for functionalities that come up from Jon using Sortly
2. Run through documentation one more time for revisions from Jon
3. Create barcodes and assist data migration to Sortly
4. Write final report - get any additional information from Jon
5. Upload deliverables to Github and share with Jon
6. Prepare Jon for final presentation
7. Create presentation slides for team portion

**1. Accomplishments Since Last Sprint**

Summary:

We updated the photos and finished adding the final desired functionalities into the documentation and presented it to Jon.

* Worked to figure out new Sortly functionalities Jon asked about
  + Jon sent us a few more actionable items to document. These actions included ways to assign multiples of a specific item to an assembly, a workaround for calculating negative inventory, and if there is a maximum number of assemblies that can be created. Since there were three tasks, we split them amongst our group members. Max worked on maximum assemblies, Shalini worked on negative inventory, and Blythe on item assignment. These were the final actions that Jon could think of for us to figure out how to do. (Max, Shalini, and Blythe 2 hours)
* Called Sortly troubleshooting to understand customer history functionality
  + We called Sortly technical support to help understand how to implement customer history functionalities. This included viewing which food banks different items are distributed to as well as timestamps of when these items are distributed. Last week, we had trouble figuring out these functionalities but we were able to quickly learn how to do this with the help of the Sortly technical support team guiding us through it. This was one of the functionalities that Jon asked us to document so figuring it out allowed us to finish our documentation for him and focus on moving forward with creating his own official account. (Blythe, 30 Minutes)
* Editing existing documentation and adding new functionalities to documentation
  + We added in the new actions into the documentation. Once again we outlined the steps required to complete each action, as well as adding in photos to help with the guidance. Furthermore, we updated some of the document’s photos to represent the actual inventory counts. We made these modifications now that we received the actual inventory from Jon. The reason we updated this information was so that the documentation was more realistic, which would make it easier for Jon and his team to learn how to use the software. (Max, Shalini, and Blythe 1.5 hours)
* Uploading and working with GWCFB inventory data in Sortly
  + In order to make the documentation more realistic, we asked Jon to send us an excel sheet with the inventory. We spent a while formatting the data so that we could easily import it into Sortly. Once we preprocessed the data, we were able to do a custom data upload into Sortly to have the actual inventory counts. We showed Jon during our meeting how to import custom data and documented it as well. (Max, Shalini, and Blythe 2 hr)
* Client meeting
  + During our meeting we walked through the last action items Jon sent us and showed him how to do it in Sortly. We also presented the overall documentation document. This wasn’t a full in-depth analysis but we just wanted to show Jon and asked for feedback and if we were missing anything. Jon actually told us it was perfect and said that we did not need to include videos, since he thought it would be overkill. Finally, we talked about the final presentation and explained what would be required on his end. (Max, Shalini, and Blythe 1 hr)
* 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 will need to work in two different softwares at the same time. Jon will be creating a Sortly account this upcoming week so he needs to be able to manage both Sortly and QuickBooks at the same time until the major data transition in June. This means that he has to complete double the tasks while learning Sortly’s functionalities.
  + We have documented every step of the process in a clear and easy to understand way to make it easier on Jon to learn. We also added reference photos for each functionality documented and organized the information making each functionality each to access. We will be helping Jon import all of his food bank data and set up initial folders and QR scanning codes so he has less tasks he needs to complete.
* As mentioned last week, 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. Also, there are a lot of functionalities that require work arounds are may not be the most intuitive.
  + We have already finished our documentation of the Sortly functionalities and plan to demonstrate these functionalities to Jon with his own account and data during our next client meeting via screen share to give him a clearer understanding of using the software.

Team

* There are some necessary functionalities that we have not documented because their necessity will not be clear until Jon goes through the software himself and learns what he needs.
  + 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. We have had to contact Sortly customer service for a few functionalities. However, Jon has been giving us the list of functionalities that he can come up with off the top of his head. There are some functionalities that will need documentation that we have not been able to do since Jon has not gone through the software on his own yet.
* Waiting on GWCFB official Sortly account
  + We have been creating our own free trial Sortly accounts to test out functionalities and write documentation. We cannot migrate any data to the official account until Jon creates the account using GWCFB’s billing information and sends us the credentials. However, Jon says that he will be creating his own account by early next week.

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

Summary:

Next week our goals mainly focus on migrating to the official Sortly account by inserting the inventory data, assigning QR codes, and tagging assemblies. We will also complete the final deliverables and answer any other questions Jon has about the software, as he tests out the functionality himself.

**Priority**

* Migrate to GWCFB Sortly account (Max, Blythe, Shalini, 2 hr each)
  + So far we have been using free trial accounts to test the functionality and make the documentation for the software. Now that we have finished these deliverables, we spoke with Jon and he said that in the upcoming week he will create a paid account and provide us with credentials. With this information we will populate the real account with the inventory data. Essentially, we are setting up the initial state of the system. However, we must keep in mind that at the end of June there will be a data transfer for new inventory (all the inventory is being changed with different providers), thus our modifications are meant as a temporary state. Jon himself stated that in this next month he will use the Sortly software along with Quickbooks for learning purposes.
* Assign barcodes and assemblies to items (Max, Blythe, Shalini, 2 hr each)
  + We will also create the setups for QR codes and assembly assignments. We will split the inventory by 3 and each be assigned a section to work with. Since none of the items have any barcodes associated with them we will create a large pdf with all the barcodes and send it to Jon. Furthermore within the software itself we will assign the appropriate items to their respective assemblies.
* Final deliverables (Max, Blythe, Shalini, 5 hr each)
  + We will be beginning our final deliverables for the conclusion of the project. We want to get ahead of the final report to determine if we need any more information from Jon so we can get it during our next meeting with him. We all have other projects and coursework to finish out the semester, so starting final deliverables will give all of us peace of mind. It will also give us an idea of what to prepare Jon for to present at the end of the semester.
* Helping Jon troubleshoot as he tests the software (Max, Blythe, Shalini, 1 hr each)
  + Jon will be creating the official GWCFB Sortly account this week. We have written documentation, but we have made ourselves available to Jon to set up a meeting to help with setting up the account and importing initial data.

**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 finished documenting the Sortly software functionalities that Jon wanted us to find out and presented them to him during our last meeting. Afterwards, we went through the entire documentation with Jon. He thought it was easy to understand and we plan on creating and populating the official Sortly account in the upcoming week.

Metrics:

Meeting 10/10 - We presented the Sortly functionalities Jon asked for in our last meeting with him. We completed a walkthrough of the entire documentation and asked Jon for some feedback. He seemed very satisfied after we showed him the new functionalities and documentation. He said it was perfect and that there was no need to add in videos (something we were planning on adding), since he believes it would be too much. The documentation was clearly understood by Jon which implies that in the future he can use it to teach others.

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 - As part of our plan for the upcoming weeks, we will create an official account under GWCFB and focus on transferring all the inventory data. This will also require us to create the assemblies within the Sortly software, and essentially set up the system as it is to be used when we are gone. There is full clarity from both us and Jon of what is expected for the remaining weeks.