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)

\* Notes for this week are at the top of community partner meeting notes \*

[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: 5/3/2021

04/30 Meeting Agenda

1. Go over Sortly folders/functionalities in Jon’s account
2. Gauge Jon’s understanding of the software to see what he needs help with
3. Answer any questions Jon may have

Sources:

<https://www.gwcfb.org>

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

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

Time Split Overview

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Blythe** | **Shalini** | **Max** |
| Migrate data to GWCFB Sortly account | 2 hrs | 2 hrs | 2 hrs |
| Called Sortly troubleshooting to understand assembly system |  |  | 0.5 hrs |
| Start barcode creation and folder organization in Sortly | 2 hrs | 2 hrs | 2 hrs |
| Final deliverables | 5 hrs | 5 hrs | 5 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** | **11 hrs** | **11.5 hrs** | **12 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. Assist Jon in creating barcodes and organizing inventory in 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: This week was focused on having Jon work with his own Sortly account. We imported all of the GWCFB inventory data into his account as well as started creating folders and barcodes for some food items. However, after our last meeting, we decided it would be best for Jon to create/organize the rest of the inventory on his own in order to better familiarize himself with the software.

* Migrate to GWCFB Sortly account (Max, Blythe, Shalini, 2 hr each)
  + Previously we had been using free trial accounts to test the functionality and make the documentation for the software. Now that we had finished those deliverables, we spoke with Jon and he created a paid account and provided us with credentials. We populated the real account with the inventory data. We set up the initial state of the system by importing all the inventory. 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.
* Assigned barcodes and assemblies to items (Max, Blythe, Shalini, 2 hr each)
  + We created some of the QR codes and assembly assignments. We created a few, but Jon said that he wanted to create them himself so that he could easily access it and learn how to use the software more effectively. He specifically told us that he wanted to handle the creation of QR codes and assemblies.
* Final deliverables (Max, Blythe, Shalini, 5 hr each)
  + We worked on our final deliverables for the conclusion of the project. This included the final report, Logo and project information, executive summary, repo and statement of completion. Since we all have other projects and coursework to finish out the semester, we decided to start working on the final deliverables early to give all of us peace of mind. This also helped give us an idea of what to prepare Jon for to present at the end of the semester.
* Helped Jon troubleshoot as he tests the software (Max, Blythe, Shalini, 1 hr each)
  + Jon created the official GWCFB Sortly account this week. We made ourselves available to Jon to set up a meeting to help with setting up the account and importing initial data.
* Client meeting
  + During our meeting we just had a small Question and Answer session about Sortly. Since we had migrated to the new account we just wanted to make sure Jon was aware of the changes we made and if he had any questions. We talked about setting up a two parent folder hierarchy. Jon said that he is going to set this up. This means one folder for active inventory and one for distributed inventory.
* 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 not having much experience with the Sortly software. Jon was extremely busy last week and was unable to test out his understanding of the Sortly software. It was important for him to do this in order to see if any issues not covered in the documentation would arise as well as help us gauge his understanding of the software.
  + We have agreed to have Jon complete barcoding the rest of the inventory items as well as have him organize the rest of the items into folders. This will help him familiarize himself with the software and help with the learning process. We plan to assist him as much as possible with these tasks in the case that any issues may arise.
* As mentioned in previous weeks, 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 talked with Jon about the best way to configure the database to suit his needs. We decided on a two parent folder model to keep track of what is on hand and what has been distributed. This way, he has a running count of all units on hand, and can pull action reports for the distributed folder for reporting.

Team

* Jon is a major factor in our final presentation
  + Since the majority of the presentation is done by Jon, we gave him a heads up that he will be talking most of the time. He expressed the intention to “wing it” which we doubled back and assured him we would make slides to guide him as well as do a practice run during our next meeting.

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

Summary:

Next week our goals mainly focus on finishing up final deliverables and preparing for the final presentation. This includes creating the presentation and practicing with Jon.

**Priority**

* Prepare the presentation (Max, Blythe, Shalini, 1 hr each)
  + We will create an outline for the final presentation. This will include the information that we would want Jon to talk about. We will talk about organization and process of building our solution, as well as what the talking about the final solution itself.
* Practice presentation with community partner (Max, Blythe, Shalini, 1 hr each)
  + In our final meeting, which is the Monday before the presentation, we will talk with Jon and explain the expectations for the presentation. We will also show him the slides and confirm that the talking points are good with him. The rest of the meeting we will just do a runthrough of the presentation so we are all on the same page.
* Assist Jon with Sortly functionalities (Mad, Blythe, Shalini, 1 hr each)
  + Since we have all collectively agreed that Jon should be the one organizing the rest of the inventory data in Sortly to better learn the software functionalities, we plan to assist him with any question that may arise. This includes providing additional documentation and making sure to promptly solve any issues he may have via email or zoom.

**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 walked through the additional documentation we completed for Jon and he looked through the account we had set up for GWCFB. He asked a few questions and told us he wants to spend more time configuring the database to his liking.

Metrics:

Meeting 10/10 - The documentation was clearly understood by Jon which implies that in the future he can use it to teach others. He expressed that he wants to work a bit more in Sortly on his own. We had already uploaded all the inventory prior to our meeting, so Jon just asked a few more clarifying questions.

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 - The rest of our time with Jon after this coming Wednesday when all the final deliverables are done will be focused on making slides and preparing Jon for our presentation. Jon is clear on what is expected of him for the presentation.