

Ali's Oil Requirements Elicitation Session 1

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Attendees

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Minutes

What does Ali's Oil do?

Ali's Oil is a petrol station truck stop. Primary customers are farmers. One service provided is delayed oil payment with no interest. Farmers repay oil debt after they receive payments for crops.

Who are the customers?

Primary customers are local/returning farmers. Some customers may be truckers passing through. Other customers may come for brick factory and farm.

What is the project scope?

Project focuses on petrol station but store is part of that petrol station. There is a hotel and restaurant on site to attract truckers. And automotive maintenance is also provided.

Are transactions from the restaurant integrated into the current system with the petrol station?

No. The restaurant is contracted out to someone else who sends monthly rent payments for the restaurant and hotel.

Transactions are tracked in notebooks. There are separate notebooks for oil transactions, loans, etc.

Would you like to keep transaction from restaurant, store, petrol station separate or track them from one place?

They would like to track all transactions in one place. They want this system to have the ability to categorize information so it is easier to sort through.

Can you describe the categories that transactions fit into?

They want oil transactions separated. Oil loans are also tracked by names, ids, record of debt, and how much has been repaid.

Is there a maximum loan amount?

No, depends on the customer; they know their customers well.

How are transactions currently accepted?

Primarily cash, and sometimes cheque. No card accepted. All cash transactions are currently logged in a book. No digital system now.

How do you want to distinguish between who is entering the information into the system?

They think it's a good idea to have employee IDs to log which employee is doing transactions. User IDs would help to prevent theft of oil by employees.

Currently, there is a problem where employees might be skimming cash or putting in too much oil for a customer. Logging system can help with this problem.

How are you able to track the amount of oil going in and out?

Currently, amount of oil sold are tracked by hand. They track how much was bought, how much remains, and profit they should have made as a result.

The pump displays how much petrol it expends, and the employee records this amount in a notebook.

Should the system we are implementing automatically detect and record how much petrol a pump expends?

No, but it will be easier with new system because manager can see employee transaction records.

How are oil prices tracked?

3 ways:

- Primary way: texts sent automatically when prices are updated
- Secondary way: check website mentioned in RFP
- Third way: call by phone

They would like oil prices pulled automatically by new system when government updates prices. Lag time in price updates mean customers are overcharged.

What currencies are currently supported?

Only Pakistani Rupee. No currency conversion required.

What grades of oil does Ali's Oil sell?

Premium, eco-plus and regular, in order of decreasing price. Diesel also sold. There are 6 pumps.

Is the product line expected to grow?

No. But the system should allow employees to add new items to inventory.

How are employees currently paid?

Primarily through cash. Also cheque. Solution should track payments to employees. Direct deposit not required.

What are the end of shift duties for employees?

The shop never closes. End of shift means end of employees on-time. They want employees to check periodically (every 12 hours or so) to check whether oil transactions are consistent.

Does the system require functionality to schedule employees?

No. This system is only looking at transactions and finances.

What is the budget for this project?

The clients proposed 500 CAD. We said we may counter.

What aspect of the business is analytics being applied to?

- Calculate customer balance automatically
- Calculate monthly profit automatically
- Daily transaction breakdown: amount of petrol sold, total cash flow...
- Aggregates of data based on periods of time: what quality of oil sells the most, brand of product, time of year the product sold the most; give ability to choose timespan

Analytics not required for individual employees.

How will the new system help to catch thieves?

It will allow accurate tracking of what has been sold at what time, so it's easier to catch thieves; easier to pinpoint when it was stolen.

Problem originated with grain. Employees might take bags of grain and it won't be noticed until grain reaches destination. Therefore, the new system should support inventory tracking.

As part of inventory tracking, they want the system to flag when one product stock is low, and be able to calculate the total value of the current inventory.

Who has access to which data? What security is required?

Manager should have access to long term (last 5 years for example) financial data, while employee may have access to data for month. They were unclear about this and will likely need to clarify. They said that employees should not have access to something if it is not required.

Manager should be able to assign security levels for employees. They suggested the following possibilities:

- Role-based security, where manager has ability to create roles
- Allow manager to categorize files into different security levels
- Individual permissions for each functionality

They stated that the company is small enough for managers to be able to manager each employee individually.

Why is remote access required?

The owner currently has to come into the store and review the paperwork with the manager to see how much money was made/lost, the amount of debt, etc.

If he can access the information summary remotely through the system so that he doesn't have to come into the store, it would be more convenient for him.

Elaborate on the training requirements mentioned in the RFP.

Currently, manager trains employees when they start. An hour was chosen to save the company money.

The new system should be intuitive enough for employees to get a general (not full) understanding in one hour, particularly because employee doesn't have access to all system functionality.

Should reports be automatically generated by the system?

Manager should be able to generate reports any time. Manager should then have the ability to select a subset of the data with filters (show me data for last X number of days).

The RFP says the system "deposits excess cash to the bank daily". How is the system depositing physical cash to the bank?

There is no requirement for automatic money deposit. Excess money is physically taken to the bank.

When someone takes out money, are they required to log that withdrawal?

Yes. Money is kept in a safe. If there is excess money, it is taken to the bank as soon as possible.

Is there any requirement for any interaction with a banking system?

No. Would only need to interact with an external system to pull gas prices automatically.