**INSO 4115: Software Requirements - Group 2**

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**Proposal**: **Scheduling Management Web Application**

1. **Domain Description**

Service organizations(a group of individuals that offer a for-profit or non-profit service) with a large client base rely heavily on the principles and practices of “Business Management” specifically “Scheduling Management” for arranging appointments between said organization and clients. Within a service organization there exists one or more individuals in charge of developing a schedule for client appointments. The scheduling format varies depending on the nature of the service; however some scheduling principles are the same. Although no college level education is needed to become a schedule manager within an organization, a scheduling manager must fulfill a set of competencies, that are dependent on the nature of the service organization.

Scheduling managers must arrange appointments with current or potential clients and organize appointments depending on the interests of the service organization( availability, time service will take,etc..)Clients that are requesting a service from the service organization must also conduct their own schedule management in order to accept a given time and date by the service organization. However not all clients have the ability to do so.

1. **Current Situation**

Business Situation/Problem 1: When a client is requesting a service from a service provider. The process of communicating, organizing, and deciding on a mutual time and date is not intuitive. People do not have the ability to calculate/identify an available date and time in the distant future without the aid of a calendar; hence making the process of coordination difficult.

Business Situation/Problem 2: In addition to scheduling, clients also have difficulty knowing what documents or supplies are needed by the service provider to complete the service.

1. **Needs**

The current state of process scheduling handles somewhat uncorrelated variables that are out of reach for the schedule manager within the service organization. Therefore, there exists a need to facilitate the way of consolidating the required info to properly schedule a service that provides help to the client via visual aid and providing help to the schedule manager by eliminating counter offer hassles by automating date selection and reminders.

1. **Ideas**

A service provider will have an individual who will act as the scheduler manager. A schedule manager is responsible to maintain and develop a schedule for client’s appointments. They will have to create all the times and dates they will be available to make appointments, depending on the service they provide. The schedule manager will have to give access to the client, after receiving all the necessary information from them. The clients will manage their own schedule and pick from a calendar. They will have all the available times and dates when they want to make an appointment and request a service. They can request or cancel anytime their appointment. The scheduling manager from the service provider will verify each appointment to notify the client which necessary documents they need to bring.

1. **Scope**

Business management consists of administering the operations of an upcoming or current business. Many tasks are involved in this job, and it is usually divided into different departments. One of those departments must work on how a business operates. An aspect of business operation consists of organizing and planning when service will be available.

1. **Span**

The span of our project is scheduling management, which consists of establishing a schedule and maintain, develop, manage and control the schedule for time and resources. The strategic benefit of schedule management is that it will monitor the schedule during its life cycle.

1. **Requirements**

The main requirement for the project would be to improve the schedulization process during the provision of a service. This includes to facilitate the request of a service from a client, i. e., provide an easy to use and quick form of scheduling from the client’s side with the intention of saving time for the client. As for the service provider, our team must provide software that uses tools to facilitate scheduling in terms of client-provider communication.

1. **Preliminary Stakeholders**

The main preliminary stakeholders of the project would be the service providers and the clients. Within the organization of the service providers, we have the leader of the organization, the main provider or group of providers and the scheduling manager(s). This depends on the size of the organization, and the same applies to the client, if not an individual.

1. **Assumption**
2. The system will be used efficiently by all the users, independent of age
3. The system will have access to the schedule manager’s database
4. The service provider will have an available platform to use the system on site
5. Service Organizations are willing to conduct business reengineering
6. I**mplicit/Derivative Goals**
7. Diminish the time requesting an appointment to eight minutes or less.
8. Secure more enjoyable staff working conditions.
9. Improve customer service.
10. Better training of current and upcoming staff members.
11. Improve customer satisfaction.
12. Expand market share of the software.
13. Lower the number of people requesting appointments in person by at least 50%.
14. Motivate people to give technology a chance to speed up their errands.
15. Reduce wait lines inside business/service provider offices by at least 30%.
16. Streamline services in each business/service provider.

**Useful Reference Links**:

* <https://www.apm.org.uk/body-of-knowledge/delivery/schedule-management/>
* <https://study.com/articles/Scheduling_Manager_Job_Duties_and_Requirements_for_a_Career_in_Scheduling_Management.html>
* <https://btdenton.engin.umich.edu/wp-content/uploads/sites/138/2015/08/Gupta-2008.pdf>
* <https://onlinelibrary.wiley.com/doi/pdf/10.1111/poms.12168>
* <https://pubsonline.informs.org/doi/10.1287/msom.1120.0394>
* <https://www.oreilly.com/library/view/operations-management-an/9781118122679/ch15-sec030.html>
* <https://rogerscarlisle.com/soc-2/whats-service-organization/>
* <https://www.business.com/articles/8-branches-of-business-management/>
* <http://www.lifetime-reliability.com/free-articles/maintenance-planning-and-scheduling/Maintenance_Planner_and_Scheduler_Skills_and_Competency_List.pdf>
* <https://www.consept.it/res/default/master-scheduling-manager-competency-model.pdf>
* <https://www.physicianspractice.com/technology/four-reasons-use-online-medical-appointment-scheduling> (average time taken when scheduling an appointment by phone)