

From: Alison Whetston
Sent: Tue 6/2/2009 4:47 PM
To: Lisa Birkman; Mary Clark
Cc: Julie Kiley
Subject: Action Items - May 27th "Community Room Rental Policy update" Meeting

Commissioner Birkman & Mary,

May 27th "Community Room Rental Policy update" Meeting

Action Items

- June 8th Agenda item for Commissioner's Court Update
- High level Project Plan
- IT requirement List (Including CLASS software functionality)

Inky has completed set-up in Class (test/training system) and IT can be ready as soon as required. After talking with Mary today, it is my understanding we may be looking at a different software solution. Do you want to put the IT tasks on hold until we receive final software requirements?

Thanks,
Alison

1. High-level Project Plan, (requires further input)

Functional Areas	Tasks	Notes	Dates	O
Resource for After Hours Room Monitoring	Determine method for resolving resource for after hours room monitor	Alternatives: - RFP Process - State List or Buy Board - Under 25K annually for commodity code? - Hire part-time <20 week		P
Class Software	Setup and configure test system	* See Class Requirements	Complete	In
	Review and sign off Test configuration			Al
	Set-up Class configuration in Production		1-Aug	In
Misc.	Confirm personal resources for scheduling and managing meeting rooms			M

	Assign Main Phone Number		1-Aug	Bi
	Assign general email		1-Aug	Je
	Order Class Software	Budget??	1-Aug	M
Payments	Define Credit Card Process	Based on process definition there may be more IT set-up required.		Ju
	Define Cash Check Process			Ju
	Receipt Process			Ju
	Room Confirmation Process			Ju
	Define Return Deposit Process			Ju
	Create a process where at set times refunds are processed and sent to whoever creates checks or refunds CC's etc.			Ju
Web-Site Requirements				
	Images with brief description of Facilitates in .dotnetnuk			Da
	Calendar			Da
	Fee Schedule			In
	PDF -Williamson County Community Room Usage Consent			In
	PDF - Rules and Regulation			In
	On-Line Form submission			D
	Create Artwork and Verbiage for homepage announcements			Da
SharePoint Calendar Views	Define SharePoint Calendar Process		Mid Sept. 1hour	In
	Set-up user accounts			In
Training	Train Room Managers on software and processes			In
	Go Live		1-Oct	Pr

2. IT Functional Requirements

Req #	Requirement Description	Mandatory or Nice To H
1	On-line Room Calendar	Mandatory

2	Provide electronic receipt	Mandatory
3	Customer notification for deposit return	Mandatory
5	Work flow notification for room manager	Nice to Have

3. Class Set-Up

Set up Under System Maintenance:

Users

Terminals

User Groups if necessary

Decide which users can do what in the system and who can process refunds etc.

Set up Under Facility Maintenance:

Booking Tab:

Forms (reminder check boxes)

Functions

Rental Extra Fees (extra personnel after hours)

Facility Tab:

Complexes

Facility Types

Facilities

Facility Fees

Attach each fee to open times they are allowed to be used for each facility

Booking Time Units (if necessary)

Other Tab:

GL Codes: Animal Shelter 01.0545.0000.362200

All Other 01.0100.0000.362200

Rentals Tab:

Change Rental Contracts / Permits to General County Name? or leave as Parks?

Create as needed reminders/ticklers to remind staff to add Security Deposit, extra staff.