		GENERAL			Mandatory/ Non-Mandatory/ Desired
Section	**Item**	**User Requirement**		**Definition/Test**	
General	S1.1	Staffing system must track staffing for all sections (areas) of the WFPS.			Mandatory
	S1.2	Staffing system must allow for tracking of different categories of employees	1	Exempt, Fire, EMS, Dispatch, support staff, hourly vs salary, part-time, full-time, on-call rotation (w/guaranteed # of hours)	Mandatory
	S1.3	Staffing system must allow for independent scheduling and tracking of different union contract rules and non-union rules.	1	Each section has separate staffing protocols	Mandatory
	S1.4	Staffing system should be a single source of data entry wherever possible.	1	Users should not have to enter information multiple times in the system.	Non-Mandatory
	S1.5	Must maintain compliance with federal and provincial labour laws, collective bargaining agreements, and other organization policies ensuring compliance			Mandatory
	S1.6	System should have an undo feature so that users are able to undo any changes they have made. This would be similar to the undo function found in other business applications such as Windows or Excel.	1	If a change is made to a staff member schedule in error then the user should be able to undo the change. There should be no time limit on when a change can be made to a staff schedule by an administrator.	Non-Mandatory
	S1.7	The system should provide a function that allows testing to verify business rule accuracy and effect prior to implementation			Non-Mandatory
Data definitions	S1.8	The system may allow for multiple jurisdiction configuration			Desired
	S1.9	Should be able to define organization or departments.			Non-Mandatory
	S1.10	Should be able to define units within an organization or department.			Non-Mandatory
	S1.11	Must be able to define different shift patterns within an organization or department.	1	Exempt work Mon - Fri	Mandatory
			2	Operational staff work 4 on 4 off	Mandatory
			3	Must be able to define reoccurring shift schedules with a tool similar to the Outlook reoccurring appointment tool.	Mandatory
			4	Create a part-time shift pattern with a rotational cycle to be defined by the system administrator	Mandatory
			5	Must be able to define multiple rotational cycles based on pre-defined criteria	Mandatory
	S1.12	Should be able to define an unlimited number of shift patterns within the system.	1	Shift patterns may be related to permanent shift or ad-hoc shift schedules.	Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
	S1.13	Each unit should be able to have its own set of business rules defined.	1	Fatigue rules	Non-Mandatory
			2	How overtime is assigned.	Non-Mandatory
	S1.14	Each business rule should have fields to allow for the tracking of Effective Start Date and Effective End Date. The start date would be utilized to show when the rule takes effect and the end date would indicate the date that the rule was retired.	1	This will allow for changes to be made in advance and take effect on a specific date (for example when a new contract comes into effect) It should be possible to enter a start date and leave the end date blank until the end date is known (for example contracts can be extended or carried forward during negotiations)	Non-Mandatory
	S1.15	The system must allow the City to create and edit business rules to govern all scheduling and leave issues applicable to full and part-time personnel and civilian personnel in multiple collective bargaining contracts.			Mandatory
	S1.16	The system must allow user-defined and editable business rules to govern leave policies, set schedules, set staffing levels, fill vacancies, handle off-duty work schedules, call out for specialty units, and other types of circumstances that might affect staffing and scheduling.			Mandatory
	S1.17	The system should provide a means to update and modify existing business rules, collective bargaining rules, and operating protocols and to schedule its implementation based on a date and time and set of criteria.			Non-Mandatory
	S1.18	Should be able to assign colour code to specific shifts defined in the system	1	WFPS has a colour code system today and can be provided.	Non-Mandatory
	S1.19	Should be able to define positions within each organization or unit			Non-Mandatory
	S1.20	Should be able to associate requirements, criteria or capabilities to a defined position.			Non-Mandatory
	S1.21	May be able to associate an agency defined position number to a defined staffing position			Desired
	S1.22	May be able to assign a person to a defined position (and position id).	1	This would be the person's permanent spot (until the next staff alt).	Desired
	S1.23	May be able to track the history for each position numbers			Desired

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
	S1.24	May be nice if the system was able to track multiple position numbers for one position			Desired
	S1.25	Should be able to define "bank" amounts that can be carried over to the next year.	1	This includes personnel vacation banks, gratuity banks, etc. Fire doesn't carry over banks Paramedic carry over some banks but have different rules for different banks.	Non-Mandatory
	S1.26	It must be possible to define payroll codes to be used in tracking attendance in the daily schedule			Mandatory
	S1.27	It should be possible to define sub codes for payroll codes	1	Record an Overtime payroll code with a sub-code that represents the reason for the overtime.	Non-Mandatory
			2	Record miscellaneous code with a sub-code for specific reason	Non-Mandatory
	S1.28	It should be possible to require the use of sub codes with certain payroll codes.	1	For example if the payroll code of OT is used, a sub code would be a mandatory field.	Non-Mandatory
	S1.29	The system should allow an unlimited number of user-defined working and non-working codes and sub codes.			Non-Mandatory
	S1.30	The system should allow the system administrator to create pick lists and shift patterns along with other required system information fields that are viewable by one or more agencies.			Non-Mandatory
	S1.31	The system administrator should be able to define the retention period for system data.			Non-Mandatory
	S1.32	System should allow for archiving system data.			Non-Mandatory
	S1.33	System should prevent users from one agency accessing data for another agency unless authorized			Non-Mandatory
	S1.34	System's reporting feature should prevent users from one agency accessing data for another agency unless authorized			Non-Mandatory
	S1.35	System should allow certain data and/or functionality to be shared across agencies e.g. scheduling rules, calendars, etc. based on configurations defined by the system administrator or designate.			Non-Mandatory
	S1.36	System should allow for each agency to have their own staffing rules based on their own collective agreements			Non-Mandatory
	S1.37	System should allow for an unlimited number of rules			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
	S1.38	System should allow for the definition and scheduling of holidays recognized in the various contracts.			Non-Mandatory
	S1.39	It should be possible to assign holidays to pre-defined shift patterns.	1	Holidays recognized by unions may differ, so it is important that the system be flexible enough to linked to some employees but not all.	Non-Mandatory
Personnel	S1.40	Should be able to track multiple date milestones for each employee such as hire date versus start date versus seniority date			Non-Mandatory
	S1.41	May be able to track the history of positions held by each employee			Desired
	S1.42	Should be able to associate skills/qualifications with each employee. Skills are then utilized to match employees to positions.	1	Would be good if this could be added in from the hire date start.	Non-Mandatory
			2	It should be possible for designated users to modify skills associated to a user	Non-Mandatory
	S1.43	Skills/qualifications may be visible when a user is recommended for a position and on all duty reports			Desired
	S1.44	It may be possible for an employee to temporarily suspend skills/qualifications based on pre-defined business rules.	1	For example, an employee may not be able to act in a senior capacity for a period of time. As a result they should be temporarily removed from the acting list.	Non-Mandatory
	S1.45	Should be able to capture and maintain various predefined time banks for each employee.	1	Time banks include: Gratuity Vacation Statutory holidays Sick	Non-Mandatory
	S1.46	Employee should be able to track all their time including Overtime, acting time, stat time, etc. (historical and future)	1	Employee should be able to run a report and have a dashboard view of this type of information. Acting time relates to promotional qualifications and therefore must be tracked properly.	Non-Mandatory
			2	Should be available in a calendar view	Non-Mandatory
	S1.47	Should be able to track the history of all return to work or modified duty events for an employee.	1	Would like a notification to go to the supervisor when the DTA is in place and when it ends.	Non-Mandatory
	S1.48	Should be able to mark an employee unavailable and associate the appropriate unavailable code (payroll code).	1	Should be able to record appropriate payroll code to the status (long term sick, WCB, return to work, etc.).	Non-Mandatory
			2	Unavailable status should be visible in all views so it is easily seen by all users.	Non-Mandatory
			3	Status should have an optional expiry date field which if used would change the user back to available status on the specified date.	Non-Mandatory

		GENERAL			
Section	**Item**	**User Requirement**		**Definition/Test**	**Mandatory/ Non-Mandatory/ Desired**
	S1.49	System should be capable of allowing users to electronically submit requests for use of accrued leave including anticipated accruals for vacation and holiday as well as notice of availability of special assignment and overtime availability.			Non-Mandatory
	S1.50	Employee should be able to modify their personal information and notification preferences through a telephony or web based user interface.			Non-Mandatory
Payroll	S1.51	Should have the ability for supervisor to sign off on absence and/or attendance records.	1	Absences must be signed by supervisor.	Non-Mandatory
			2	Acting pay must be signed by supervisor.	Non-Mandatory
	S1.52	Overtime should be signed off by appropriate personnel.			Non-Mandatory
	S1.53	Acting time should signed off by supervisor and coded appropriately.			Non-Mandatory
	S1.54	May be possible to capture electronic signatures for sign off			Desired
	S1.55	It must be possible to assign payroll (status) codes and associate them to each shift personnel work	1	Be able to associate codes such as: a) regular time b) overtime pay c) overtime banked d) WCB e) Sick paid by union See full payroll code spreadsheet.	Mandatory
	S1.56	Should be able to track the balance of Stat holidays on an ongoing basis to ensure it levels out over the course of the year.	1	See rules around stat days and short term or maternity leave time as this impacts the allotment of hours in the various banks.	Non-Mandatory
Staffing levels	S1.57	Must be able to define a minimum staffing level for each hall and area.			Mandatory
	S1.58	Must be able to define a minimum staffing level for each hall and each shift and area separately	1	Each hall could have a different minimum staffing level for each shift based on operational needs.	Mandatory
	S1.59	Must be able to define a minimum staffing level for each hall for time of day (day shift vs. night shift) and each type of unit.	1	Each hall could have a different minimum staffing level for each shift based on time of day (day/night). This also needs to take into consideration qualifications.	Mandatory
	S1.60	Must be able to define a minimum staffing level for each District Chief Area which must correspond (incorporate) the minimum staffing level for each hall and time of day).			Mandatory
	S1.61	Should have option to define staffing levels for each unit type assigned to a hall			Non-Mandatory

		GENERAL			
Section	**Item**	**User Requirement**		**Definition/Test**	**Mandatory/ Non-Mandatory/ Desired**
	S1.62	Should be able to assign criteria/qualifications to each position on apparatus, in hall by shift.			Non-Mandatory
	S1.63	Should be able to manage a single crew being able to be assigned to 2 apparatus (cross staffing)			Non-Mandatory
	S1.64	It should be possible to define a position as mandatory or optional within the scheduling system.			Non-Mandatory
	S1.65	Optional positions may be able to be prioritized to represent the order they are to be filled in.	1	Minimum staffing positions should be marked as mandatory. All positions above minimum should have the option to define the order in which they are to be filled once minimum staffing levels are met.	Desired
	S1.66	Should allow the user to assign a specific # of hours that a person is allowed to work so that a warning is presented when they are going to exceed the # of hours.			Non-Mandatory
	S1.67	Should be able to create ad-hoc overtime shifts for special events			Non-Mandatory
	S1.68	Should be able to identify overtime shifts which are billable or included in other cost recovery actions			Non-Mandatory
	S1.69	Should be able to create ad-hoc shifts to record shifts being worked by employees on return to work or modified duty shifts.			Non-Mandatory
	S1.70	Should be possible to track "on call" personnel.			Non-Mandatory
	S1.71	Must alert user when staffing levels fall below requirements ensuring proper coverage is maintained			Mandatory
	S1.72	Alerts must be available to notify schedulers of shortages in specialties and rank.			Mandatory
	S1.73	May allow employees to indicate the days, shifts, or events in which they are available to work extra (O/T)			Desired
	S1.74	Should be able to record employee vacation time in the schedule in advance			Mandatory
	S1.75	Authorized users should have the ability to create requests for personnel with specific skills sets to be seconded or temporarily allocated to another organizational unit.	1	For example, the training section should be able to request instructors or Acting Training Officers for training classes. It should be possible to schedule these in advance.	Non-Mandatory
	S1.76	Schedules should be viewable for at least 24 months in advance			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
Staffing changes	S1.77	Should be able to alter employee's permanent position as required	1	Staff movements are required on an ongoing basis due to retirements, promotions and other staff changes.	Non-Mandatory
	S1.78	The date of the transfer should be definable by the agency.			Non-Mandatory
	S1.79	Should be able to adjust staffing (ad-hoc) based on pre-defined business rules.			Non-Mandatory
	S1.80	It should be possible to define business rules for retraining requirements if an employee has not been assigned to a position for a defined period of time	1	For example, if an employee has not worked in a Suppression position for more than 6 months, they must receive sign off from Training before being able to work in Suppression.	Non-Mandatory
	S1.81	Should have the ability supervisor to sign off on staffing changes.			Non-Mandatory
	S1.82	It should be possible to mark a position/employee or group of employees as not available for movement or staffing changes on a given day or set of shifts.	1	When training is scheduled, an employee may be marked as "Do Not Move" to accommodate the training.	Non-Mandatory
View staffing levels	S1.83	Should be able to view the minimum staff number defined for each hall	1	Each hall has a minimum staffing levels. This number should be visible to defined user levels.	Non-Mandatory
	S1.84	Should be able to view the minimum staff number defined for each hall and each shift			Non-Mandatory
	S1.85	Should be able to view the minimum staff number defined for each hall for time of day			Non-Mandatory
	S1.86	Should be able to view the current staffing levels for each hall and shift and by time of day			Non-Mandatory
	S1.87	Should be able to view the minimum staff for each District Area			Non-Mandatory
	S1.88	Should be able to view the total strength assigned to each hall and shift accounting for all staff permanently assigned to each hall on each shift.			Non-Mandatory
	S1.89	Should be able to view all positions for each District Area or EMS district			Non-Mandatory
	S1.90	Should be able to view all officer positions for all halls			Non-Mandatory
	S1.91	Should be able to view all officer positions for each District area			Non-Mandatory
	S1.92	Should be able to view all officer positions by shift and hall or organizational unit			Non-Mandatory

		GENERAL			
Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
	S1.93	Should be able to create a view of the personnel qualified to "act" in a senior capacity.	1	View should be able to be shown for the whole department, an organization/department, shift or other criteria. Must be able to decline to act in a senior capacity on a one-year basis.	Non-Mandatory
	S1.94	Should be able to filter the view of the personnel qualified to 'act' in a senior capacity by single or multiple criteria so that the user can see only acting D/Cs or only acting Captains etc.	1	Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority	Non-Mandatory
	S1.95	Should be able to create a view to show upcoming vacations	1	View should be able to be shown for the whole department, an organization/department, shift or other criteria. This is also a view that could be applied to an individual user.	Non-Mandatory
	S1.96	Supervisors should be able to view all requests for leave using defined criteria	1	View should be able to be shown for the supervisors assigned staff members.	Non-Mandatory
	S1.97	Should be able to view schedules of all employees with defined qualifications or skills by single or multiple criteria.	1	Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority e) Specialty (qualification/skill)	Non-Mandatory
	S1.98	Supervisors may be able to view an employee's planned schedule versus what they actually worked.			Desired
	S1.99	Should be able to view schedules of all employees with the qualification Acting Training Officers and Instructors with specific skill sets			Non-Mandatory
Shift Trades/ Subbing	S1.100	Should allow for employees to trade shifts based on predefined business rules.			Non-Mandatory
	S1.101	Shift trades may involve 2 or more employees and all related trades should be tracked. All exchanges should be recorded with the relationship to all other related trades.			Non-Mandatory
	S1.102	Shift trades on Statutory holidays should be flagged so that the payroll is able to adjust any stat pay for all involved in the shift trade.			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/Non-Mandatory/Desired
		GENERAL			
Section	Item	User Requirement		Definition/Test	Mandatory/Non-Mandatory/Desired
	S1.103	The system should record and display all employees included in the shift trade (who was scheduled to work, as well as the actual person who worked)	1	Would be good if the system could alert if someone from the shift trade is booked off sick ahead of time. Would like a flag for the Platoon Chief of the shift that the person belongs to which would indicate that a sick note is required.	Non-Mandatory
	S1.104	Should be able to track all time earned or owed outside regular work hours.			Non-Mandatory
	S1.105	Earned time must be used by the end of each year. The system should provide ongoing alerts or notifications regarding status of earned and owed time for each user.	1	365 days from the first shift in the trade.	Non-Mandatory
	S1.106	The system should allow for the users to perform private shift trades	1	A private trade occurs when a trade happens directly between 2 or more people. Must be based on qualifications.	Non-Mandatory
	S1.107	The system may allow for the users to post for public shift trades	1	A public trade occurs when someone is unable to find another employee to trade with. This feature should allow the user to post the trade for any appropriate resource to accept. Must be based on qualifications.	Desired
Vacation Assignment	S1.108	Staff allocation of vacation should be managed within the scheduling system			Non-Mandatory
	S1.109	It should be possible to allocate staff vacations on an annual basis based on predefined business rules.			Non-Mandatory
	S1.110	It may be possible for the employees to request vacation time on an annual basis based on predefined business rules.			Desired
	S1.111	Employees, vacation requests should be placed in a "pending" type status when initiated pending approval by person in authority.			Non-Mandatory
	S1.112	Employees, vacation requests should be approved by person in authority before they are accepted.			Non-Mandatory
	S1.113	The system should allow for vacation bidding based on defined business rules			Non-Mandatory
	S1.114	The system should allow users to trade vacation spots based on defined business rules			Non-Mandatory

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		GENERAL			
	S1.115	When annual leave entitlements have been assigned to a member, the system should have a mechanism for alerting the member of the assigned time and provide them a way to acknowledge the time.			Non-Mandatory
Vacancies	S1.116	Employee should be able to record a "book off" when they are unavailable to work.			Non-Mandatory
	S1.117	When booked off, the employee should be able to record a "book back" when they become available to work.			Non-Mandatory
	S1.118	Both the book off and book back processes should be able to be automated (phone or electronically)			Non-Mandatory
	S1.119	When an employee books off or on, specific data should be captured	1	Type of leave, reason for leave (i.e. if a family illness - whom it is related to - mother, wife, child etc.)	Non-Mandatory
	S1.120	Notifications of all book off/ons should be sent to designated supervisory personnel.	1	Employee's immediate supervisor must be notified.	Non-Mandatory
			2	It should be possible to turn notifications on or off on a case by case basis.	Non-Mandatory
	S1.121	May be able to associate an alpha-numeric payroll code to the employee associated to the permanent position who is unable to fill the position			Desired
	S1.122	Should have a notes field where information related to the vacancy can be captured (the reason the person was off work)	1	Free form text to make appropriate notes of vacancy.	Non-Mandatory
	S1.123	All requests for time off submitted by an employee should be approved by an authorized user (supervisor) before being marked as a vacancy.			Non-Mandatory
	S1.124	A supervisor should be able to accept or reject a request for leave. A field should be present for supervisor to include a reason.			Non-Mandatory
	S1.125	Clicking on a request in the request queue should take the user to the specific day so they can determine staffing levels and approve/deny the request	1	Would like a warning to be generated if leave request is going to require OT to fill. Would like a warning to be generated it leave request is going to exceed leave bank.	Non-Mandatory
	S1.126	System should automatically track time off requests that have been approved and notify attendance and payroll as required.			Non-Mandatory

		GENERAL			
Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
	S1.127	Should be able to create ad-hoc schedules for personnel on Return to work assignments			Non-Mandatory
	S1.128	Should be able to restrict Return to work shifts based on criteria provided through the Return to work process.			Non-Mandatory
	S1.129	Should be able to define the appropriate business rules to determine if a vacancy can be left open or must be filled.	1	Criteria is different for each organization/department. Need to be able to override this if a vacancy occurs in the middle of the night etc.	Non-Mandatory
	S1.130	Vacancies in the schedule should be presented to the user in a clear and concise manner.	1	Should be colour coded with a number that shows how many short.	Non-Mandatory
	S1.131	User should be able to view the criteria for a specific vacancy			Non-Mandatory
	S1.132	When filling a vacancy, the user should be able to view a recommendation for the replacement staff member based on predefined business rules including skills.			Non-Mandatory
	S1.133	Recommendation may include a minimum of 5 personnel displayed in order of recommendation based on business rules.			Desired
	S1.134	When recommendations are presented, it should be possible to see any cascade effect of selecting the recommended employee.	1	By seeing the "knock-on" impact of selecting the recommended employee the scheduler has the ability to view any vacancies created and weigh out the most desirable action and "what if" scenarios.	Non-Mandatory
	S1.135	User should be able to manually accept the desired personnel from the recommendation.			Non-Mandatory
	S1.136	User should be able to override the recommendation and manually select different appropriate resource. Should include:	1	Optional confirmation pop-up, configurable by the administrator - confirming the user wants to override the system recommendations,	Non-Mandatory
			2	Audit trail showing the original recommendations, the manual override, user name, time and date.	Non-Mandatory
			3	A visual indication that the vacancy was filled with an override of the recommendation provided.	Non-Mandatory
	S1.137	The system should maintain an audit trail of all rules used to fill vacancies.			Non-Mandatory
	S1.138	Users should be able to run a query to display only the vacancies for specific criteria including capabilities, shift, time/date range or user.			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
	S1.139	Should be able to identify a fill-in of a position as billable or included in other cost recovery actions			Non-Mandatory
	S1.140	When reassigned from their primary position to cover another vacancy, it should be possible for the scheduler to mark that user as available for instances where they may be required to be moved back to their primary position.	1	Would like the system to provide feedback to the users for total number of hours in a year (hours owed, time off owed etc.) when adjusting schedules from 4/4 to 5/2 etc.	Non-Mandatory
	S1.141	It should be possible for defined users to revise a schedule after the shift has been completed.			Non-Mandatory
Reports	S1.142	It should be possible to run a ad-hoc or scheduled report to display all of the employees in return to work/modified duty status.			Non-Mandatory
	S1.143	Report requirement - # of hours a light or modified duty person is working to ensure they are working appropriate number of hours			Non-Mandatory
	S1.144	Reporting requirement - list of secondments, where they come from and where they are seconded to			Non-Mandatory
	S1.145	Reporting requirement - should to be able to provide a report of persons that work for someone who has run out of sick time. The report is for the union.			Non-Mandatory
	S1.146	Reporting requirement - should to be able to provide a report of time owed or earned.			Non-Mandatory
	S1.147	Users should be able to display a daily "duty roster" style report.	1	User should be able to define criteria for report, such as: a) District area b) Halls c) Halls broken down by apparatus including vehicle information d) Specialty Teams e) Scheduled Training	Non-Mandatory
	S1.148	Duty reports should contain a visual indication of any specialty skill sets for each employee.			Non-Mandatory
	S1.149	Should have the ability to report all work at defined pay codes based on specific criteria	1	Criteria could include: a) Date Range b) Organizational Unit c) District Area	Non-Mandatory
	S1.150	Should have the ability to report all work at defined pay rates based on specific criteria	1	Criteria could include: a) Date Range b) Organizational Unit c) Battalion Area	Non-Mandatory

		GENERAL			
Section	**Item**	**User Requirement**		**Definition/Test**	**Mandatory/ Non- Mandatory/ Desired**
	S1.151	Should have the ability to run report on specific individuals to view their "acting" time.	1	Should include the option for date range in the query	Non- Mandatory
	S1.152	Daily report to show all personnel who have booked off with the associated payroll code for the book off.			Non- Mandatory
	S1.153	Daily report to show all personnel who have booked on with the associated payroll code for the book back if appropriate.			Non- Mandatory
	S1.154	Report to represent all officer movements (equivalent to the current Pool Posting).	1	May contain the following information at a minimum: a) Rank b) Name c) Hall d) Shift e) Moved to: f) Moved From: g) Reason	Desired
			2	List may be sorted by seniority	Desired
			3	May group the "to" moves first and then the "from" moves.	Desired
	S1.155	Should be able to produce a report showing time in a specialty position	1	This could include time in positions such as Acting Training Officer, Instructor, HAZMAT, Tech Rescue etc.	Non- Mandatory
	S1.156	Should be able to produce a report for each employee or a group of employees showing the history of each position held including time in each position	1	As part of the staffing alterations, the time in position is utilized to determine if staff reallocations should occur. This report is also used when reviewing employees' career development.	Non- Mandatory
	S1.157	Report to represent all scheduled vacations.	1	Should be able to narrow the report based on defined criteria such as: a) Time/date b) Hall c) Organization/Department d) Battalion Area	Non- Mandatory
	S1.158	Should be able to produce a report showing overtime for a specific employee or group of employees.	1	For example, a report showing all the overtime accumulated for employees in the FPO office as this is used to determine how overtime is allocated.	Non- Mandatory
	S1.159	Overtime report should be able to include the daily totals for a specific period of time as well as the overall totals.			Non- Mandatory
	S1.160	Should be able to create a dashboard type report for supervisors and other designated users to show specific benchmarks for the employees they are responsible for	1	For example, a report that shows: Current Overtime totals Absences Vacations	Non- Mandatory

		GENERAL			Mandatory/ Non-Mandatory/ Desired
Section	**Item**	**User Requirement**		**Definition/Test**	
	S1.161	Each user should be able to create a dashboard type report to show specific benchmarks for themselves.		For example, a report that shows: Current Overtime totals Absences Vacations	Non-Mandatory
	S1.162	Users should have the ability to (at a minimum) collect and report out specific pieces of information which are required by the payroll system.	1	a) Payroll Code b) Code Description c) Reason sub code d) Authorizing person e) PeopleSoft ID # f) Permanent Hall g) Shift h) Confirmed Rank i) Member Name j) Acting Name k) Location of Work l) Comments/Remarks m) WCB Recurrence Y/N n) Absence Began o) Absence End	Non-Mandatory
	S1.163	Should be able to schedule reports to run automatically on a predefined basis	1	Daily reports for payroll or management could be scheduled to run at predetermined times.	Non-Mandatory
	S1.164	Reports can be viewed, shared, printed or e-mailed on demand and customizable			Non-Mandatory
	S1.165	Should be able to email scheduled report to defined users or distribution lists.			Non-Mandatory
	S1.166	Easily view trends and monitor employees' time and leave events as well as where labour costs are spent			Non-Mandatory
	S1.167	Should be able to define criteria and indicators to identify attendance trends.			Non-Mandatory
	S1.168	Notifications of attendance trends should be able to be sent electronically to defined users			Non-Mandatory
	S1.169	Create an automated shift report that can be sent to HQ. This report should include anyone on any type of leave including union leave, sick leave, WCB etc.	1	The report should be automatically regenerated and resent to the email distribution list when a change is made (i.e. half way through a shift)	Non-Mandatory
Interfaces	S1.170	Interface from the scheduling system to PeopleSoft e.g. for time entry and; Interface from PeopleSoft to scheduling system – e.g. for personnel data			Non-Mandatory
	S1.171	Should have the ability to interface with Business Intelligence tools			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
	S1.172	Ability to interface with Software Records Management System (RMS). This may be a two way interface	1	Interface would include personnel data, for example data relative to certifications or skills	Desired
	S1.173	It should be possible to import scheduling and personnel related data into the scheduling system from other databases or spreadsheets (such as Access database or Excel)	1		Non-Mandatory
	S1.174	Should allow for a real-time interface with the CAD system	1	Will send roster information and skills to be used in the CAD	Non-Mandatory
	S1.175	The system should support the manual or automated extract of data in formats that are usable for all standard applications including, but not limited to:	1	.csv	Non-Mandatory
			2	.html	Non-Mandatory
			3	.xml	Non-Mandatory
			4	.rtf	Non-Mandatory
			5	.doc	Non-Mandatory
Notifications	S1.176	System should support notifications to the following types of systems: Email Phone Text/SMS			Non-Mandatory
	S1.177	It should be possible to define more than one of each type of notification for each user.			Non-Mandatory
	S1.178	Users should be able to define at least 3 preferred methods of communication (phone, text, email)			Non-Mandatory
	S1.179	Users should be able to phone a central (pre-defined) number and advise of a book off/on situation			Non-Mandatory
	S1.180	System must maintain a complete audit trail of all interactions/notifications with personnel for historical audits.	1	Must be able to see all notifications including date and time stamp. If successful it should include success criteria, date and time stamp If not successful it should include record of actions taken, criteria, data and time stamp.	Mandatory
	S1.181	Rules should be able to be defined for when a user must report book off/on to a defined person in authority	1	Examples: Users should have to talk to a defined person in authority when a) User wants to book off more than 5 days in advance b) User wants to book off less than 2 hours in advance of the shift. This needs to be definable based on the business or bargaining unit	Non-Mandatory

		GENERAL			
Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
	S1.182	When a user's shift is modified the system should automatically contact the user to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually.	1	Would like the ability to hide the change until the user is ready to publish or commit the change.	Non-Mandatory
	S1.183	When a user's shift is modified the system should automatically contact the affected halls to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually.	1	Would like the ability to hide the change until the user is ready to publish or commit the change.	Non-Mandatory
	S1.184	The system may send an alert to the supervisor when an employee reach pre-defined milestones such as #of absences. For performance management		The system send an alert to the supervisor when an employee reach pre-defined milestones such as #of absences. For performance management	Desired
User Interface	S1.185	Users should be able to access staffing system through a web interface.			Non-Mandatory
	S1.186	Users should be able to access staffing system remotely.	1	Outside the network i.e.: through a firewall	Non-Mandatory
	S1.187	Users should be able to access staffing system through smartphone or similar application.			Non-Mandatory
	S1.188	Users should be able to access the system through a telephony system (by phone).			Non-Mandatory
Security	S1.189	The system should be capable of supporting multiple agencies within the same server plan/deployment			Non-Mandatory
	S1.190	The system should allow the system administrator to limit user access to view and make changes within their own agency or across agencies if deemed appropriate.			Non-Mandatory
	S1.191	The system must require a user name and password for each authorized user.	1	User names shall be definable by the system administrator.	Mandatory
	S1.192	The system must allow multiple levels of security access from end-user to agency supervisor/administrator			Mandatory
	S1.193	It must be possible for the system administrator to define what the security levels are and (if necessary) create custom security groups			Mandatory
	S1.194	Business rules must be able to be either shared or not shared as appropriate			Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
		GENERAL			
	S1.195	User should be able to change passwords without having to request the change from the System Administrator			Non-Mandatory
	S1.196	The system administrator must be able to define the format for user passwords			Mandatory
	S1.197	The system administrator must be able to define whether passwords expire on a scheduled basis or not			Mandatory
	S1.198	If passwords are set to expire, a system warning must be presented to the user			Mandatory
	S1.199	Any system warning about password expiry must be configurable as to content and how far in advance it will be presented to the user			Mandatory
	S1.200	The system must allow temporary duty assignments for administrators allowing modifications to security on a temporary basis	1	Example is when a supervisor goes on leave and the person filling in will assume their responsibilities in Telestaff while they are away.	Mandatory
	S1.201	It must be possible to assign individuals a higher security access for a specific time period.			Mandatory
	S1.202	System must enable the system administrator to designate under appropriate security authorization, application administrators and sub administrators to enable assignments and approve schedules and exceptions.			Mandatory
	S1.203	The system must maintain a complete audit trail for all transactions performed in the system.	1	At a minimum, the audit trail should include data/time stamp, action taken, changes made, user id	Mandatory
	S1.204	It must be possible for the system administrator to select the tables or columns to be applied to the audit trail. This will allow the system administrator to manage database performance and limitations as required.			Mandatory
	S1.205	It must be possible to use Active Directory log on so that a single sign on profile can be used.	1	Non-AD users must be able to access via other sign on methodologies.	Mandatory
Business Continuity	S1.206	If the system becomes unusable, the users should be able to have an alternative version of the schedule with the employees in their primary	1	The users should be able to use a 'blank' form template to record existing staffing and future staffing.	Non-Mandatory

		GENERAL			Mandatory/ Non-Mandatory/ Desired
Section	**Item**	**User Requirement**		**Definition/Test**	
		positions. This would establish a "blank" schedule to be could then be used as a starting point for manually	2	Alternative versions would include Excel spreadsheet and/or printed versions.	Non-Mandatory
	S1.207	It must be possible to run scheduled back up of the database based on pre-defined practices.			Mandatory
	S1.208	Availability • The system must be architected to work in a high availability environment	1	In the event of failure of all or part of the system (hardware or software), the system must be able to fail over to backup infrastructure (same site of off-site location) in a minimal amount of time without any loss of data	Mandatory
			2	The system is expected to be available 7x24x365	Mandatory
	S1.209	Recoverability - If for any reason there is a need to restore the system to a backup copy of the database, then the system must operate without error based on the data as of the time of the backup			Mandatory
Compliance	S1.210	The system must comply with all requirements of the Manitoba Freedom of Information and Protection of Privacy Act (FIPPA) , Personal Health Information Act (PHIA)			Mandatory

		TECHNICAL			
Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/ Desired
Client Services	S2.1	The system should operate on a standard industry-recognized operating system			Non-Mandatory
	S2.2	The system should provide a smart phone interface capable of working on Android Marshmallow (6.0), Blackberry or iOS			Non-Mandatory
	S2.3	The user interface should scale appropriately based on the size, orientation and screen resolution of the user device.			Non-Mandatory
	S2.4	Any Web App or Web Interface should operate in modern browsers including Safari, Firefox, Internet Explorer, Microsoft Edge, Google Chrome			Non-Mandatory
Infrastructure	S2.5	The system must communicate in an IP network			Mandatory
	S2.6	The system should be capable of transmitting alerts and notification via SMS, SMTP, EMTP or commercial paging			Non-Mandatory
	S2.7	Must be capable of operating in a Windows Server 2008 r2 or higher environment.			Mandatory
	S2.8	The database should be on a standard industry-based database			Non-Mandatory
	S2.9	The vendor should allow for annual upgrades of OS and DB	1	The vendor should allow for annual upgrades of OS and DB	Non-Mandatory
	S2.10	System backups must not negatively impact system performance	1	System backups must not negatively impact system performance. Vendor shall propose the best practices for archiving data from the primary database.	Mandatory
	S2.11	CAD vendor should provide application health status alerts to facilitate SNMP monitoring or similar technology.	1	CAD vendor should provide application health status alerts to facilitate SNMP monitoring or similar technology.	Non-Mandatory
	S2.12	The system should support importing and exporting in XML	1	The system should support importing and exporting in XML	Non-Mandatory
	S2.13	The vendor must provide the source code, with annual updates	1	The vendor must provide the source code, with annual updates	Mandatory
	S2.14	The vendor must provide the database schema, with annual updates	1	The vendor must provide the database schema, with annual updates	Mandatory
	S2.15	The vendor must provide the database dictionary	1	The vendor must provide the database dictionary	Mandatory
	S2.16	The vendor must provide detailed system administration documentation	1	The vendor must provide detailed system administration documentation	Mandatory
	S2.17	The vendor must provide system administration training	1	The vendor must provide system administration training	Mandatory

		TECHNICAL			
Section	**Item**	**User Requirement**		**Definition/Test**	**Mandatory/ Non-Mandatory/ Desired**
	S2.18	The vendor must provide functional documentation	1	The vendor must provide functional documentation	Mandatory
	S2.19	The vendor must provide functional test plans and test scripts	1	The vendor must provide functional test plans and test scripts	Mandatory
	S2.20	The vendor may provide load test scripts	1	Load simulation and timing mechanisms	Desired
	S2.21	The vendor must provide a system architecture diagram	1	The vendor must provide a system architecture diagram	Mandatory
	S2.22	The vendor should provide a multiple environment test environment	1	There should be at least the following database environments required - Production (LIVE), training and development	Non-Mandatory
	S2.23	Database backup	1	The system must provide the ability for on line/hot backups of the database without impairing system operation	Mandatory
	S2.24	Failover capability	1	The system must have the ability to fail over to another server/system	Mandatory
	S2.25	The system must support current industry standard infrastructure formats	1	The system must be capable of operating in a Virtual Machine environment	Mandatory
			2	Virtual Machine environment includes database servers, interface or application servers and dispatch workstations	Mandatory

		CORPORATE			
Section	**Item**	**User Requirement**		**Definition/Test**	**Mandatory/ Non-Mandatory/**
Corporate General	S3.1	Vendor solution is currently installed in departments of similar size and number of users		Vendor should be able to provide references	Non-Mandatory
	S3.2	Vendor must support/work with standard vendors for various interfaces including CAD and			Mandatory
	S3.3	Vendor must offer annual maintenance packages			Mandatory
	S3.4	Vendor must provide a warranty for the product/solution			Mandatory
	S3.5	Vendor should offer an extended warranty			Non-Mandatory
	S3.6	Vendor may support/provide a user conference	1	Vendor may support/provide a user conference	Desired
	S3.7	Vendor may support/provide a Canadian user conference	1	Vendor may support/provide a Canadian user conference	Desired
	S3.8	Vendor may support a regional user conference	1	Vendor may support a regional user conference	Desired
Product Documentation	S3.9	The vendor should provide a system database schema			Non-Mandatory
	S3.10	The vendor should be able to describe the different services and levels of support that are available			Non-Mandatory
	S3.11	The vendor should provide product release notes for the version of the software being recommended for use			Non-Mandatory
	S3.12	System documentation should include both user guides and system administrator guides			Non-Mandatory
	S3.13	The vendor may provide system test plans	**1**	User Acceptance Test Plan	Desired
			2	Regression Test Plan	Desired
Client Support	S3.14	The vendor should provide technical assistance with the configuration of the system			Non-Mandatory

Section	Item	User Requirement		Definition/Test	Mandatory/ Non-Mandatory/
		CORPORATE			
	S3.15	The vendor should provide technical assistance with the implementation of the system			Non-Mandatory
	S3.16	A predefined process and associated expected timelines for trouble resolution may be provided			Desired
	S3.17	The vendor must be able to provide a process for system upgrades			Mandatory
	S3.18	System solution should be subject to an internal (vendor) QA process			Non-Mandatory
	S3.19	The vendor must provide software configuration training to identified super users			Mandatory
	S3.20	The vendor may provide user-level training in a train-the-trainer format			Desired
	S3.21	The vendor should provide implementation and project support			Non-Mandatory
	S3.22	Vendor must provide 7/24/365 support	1	The vendor must provide an agreed service level agreement	Mandatory
			2	The vendor must provide a response within a certain time frame to calls for assistance	Mandatory
			3	The response time must be based on the priority of the request	Mandatory
			4	The vendor should provide first, second and third level support	Non-Mandatory
			5	The vendor should provide a web-based knowledge bank;	Non-Mandatory
			6	Users may be able to post information/issues to the web-based bank	Desired
	S3.23	The vendor may provide a file transfer site;			Desired
	S3.24	Vendor should track and monitor customer submitted bugs		Should track, monitor bugs and provides feedback to the customer	Non-Mandatory
	S3.25	Vendor should provide a single point of contact		The vendor should provide a single point of contact for customer support This should include a single project	Non-Mandatory

		CORPORATE			
Section	Item	User Requirement		Definition/Test	Mandatory/ Non- Mandatory/
User Base	S3.26	Vendor is currently installed with a number of users and anticipated call volume	1	Refer to the Assumptions worksheet for details	Mandatory

	Glossary	
Term	**Definition**
Report	A report is the results of a query or view that can be exported or printed from the application based on a predefined format or template.
Query	A query is a request for information based on a specified set of criteria. The results of a query are displayed within the application with the option to export to a application (e.g. Excel, Word, etc.) or produce a report based on a standard format.
View	A view is a formatted way of looking at data within the application. A view can be the results of a query with the option to produce a report.