

The 2009 CBORD User Caucus Response

Putting Your Caucus Feedback to Work at CBORD

Thank you to our users who attended the 30th annual CBORD User Group Conference (UGC) and shared their ideas, thoughts, concerns, and suggestions about both the “state of CBORD” and the “future of CBORD.” We appreciate your time and effort and value your honest feedback. In return, we will consider and apply your suggestions to help improve CBORD’s performance.

The User Caucus is the most important session you attend and helps us achieve our “future state.” Over the years, the caucus process has facilitated many key development efforts, including great new functionality for our users, with more feature-rich systems for us to sell in the marketplace. Thus, the value of the caucus to both your organization and to CBORD can hardly be overstated.

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Corporate & Commercial Foodservice Management
Common Interest Group
2009 CBORD® User Group Conference (UGC)
User Caucus Points of Discussion



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Top Five Things CBORD Is Doing Well:

1. CBORD is always there and willing to help, especially with technical questions. Response is really good.
2. Staff is very knowledgeable.
3. When you do have a question, the follow-through from CBORD is good in regard to seeing if the issue was resolved.
4. WebEx events.

Top Five Things CBORD Could Improve:

1. Email confirmation—when sending in support email, would like to receive a case number back immediately.

CBORD Response:

When issues are submitted to CBORD Support using email, an email confirmation containing the case number and case title are sent to the customer. Issues submitted to CBORD via email may take up to one business day for the case to be created and a corresponding email confirmation to be sent. If an issue requires an immediate response, we strongly encourage you to call the CBORD Support line to report the issue.

Top Five System Enhancements Requested:

In addition to the individual request responses, it may be helpful for customers to review the commitments we have made to the College & University and Healthcare Foodservice Management Caucus requests. There are a number of Foodservice and Catering enhancements that should be interesting to Corporate & Commercial Foodservice Management customers.

1. Rework the Recipe Cost Report to include the cost of sub-recipes as well as percentage of individual item cost in comparison to whole (great way to catch incorrect Rx quantities or incorrectly received items), and allow this report to be “saved as” in Excel.

CBORD Response:

We can add the cost of sub-assembly recipes and add a column to show the percentage of each ingredient to the whole of the recipe. Delivery commitment: fiscal year Q4. Creating an Excel export is problematic due to the multiple reports that are generated to make up the one report. The UAC is helping to define what the exported requirements are in Excel; we can then better enhance this report to show the calculations or sort that is needed. Need detailed requirements by March 31, 2010 to meet Q4 commitment.

2. Add a static tab to Item Maintenance where recipe revisions can be kept for reference instead of completely being overwritten. Or, allow the recipe screen (with quantities and yields) to be copied into one of the available note fields. Currently, only a print screen into another program works when trying to keep track of the evolution of a Rx.

CBORD Response:

We would like to better understand exactly what the customer is trying to track for recipe change history. Are print screens really needed, or is data associated with ingredient quantity and yield changes the real goal? What is going to provide the greatest value to track research recipe changes? If the system were to calculate and store all the changes being made, it would be an enormous amount of data to store. Delivery commitment: working with the UAC to define the requirements. Need detailed requirements by March 31, 2010 to meet Q4 commitment for FY 2010.

3. Additional query choice for Transfer Manager reports: query by unit (defaults to portion, but this often conflicts with how a supermarket/catering environment has to sell versus how it needs to appear on a nutrition label). And if all show on reports, it is too confusing and long to have one item with all those variations of portion unit showing up.

CBORD Response:

We need further details for the request to understand exactly how the selectors need to be enhanced and how the report needs to be filtered. We would like to provide enhancements to the Transfer Price and Sell Price Manager functionality and this

request would meet this goal. Delivery commitment: fiscal year Q4. We are currently verifying feedback on selectors and filters that would best meet customers' needs. We will provide an updated response in April. Need detailed requirements by March 31, 2010 to meet Q4 commitment for FY 2010.

4. In Transfer Price Manager, have the last selection used appear as the default for both Contract Price Setting and Select Report Style instead of the current date and first group in list.

CBORD Response:

This is a good request. We would like to meet with the UAC representatives to ensure that the use cases are being met for this request. Delivery commitment: fiscal year Q4. We are currently verifying use cases to complete specifications for this request. We will provide an updated response in April. Need detailed requirements by April 30, 2010 to meet Q4 commitment for FY 2010.

5. Have more Requisition reports available to print from the actual Requisitions screen (specifically, Invoice); have the note "Entered on Requisitions" print on Invoice reports.

CBORD Response:

Only single Requisition reports may be generated from the Requisitions screen. We will provide a list of those that can be added and will have the UAC verify that those would meet this request. Delivery commitment: fiscal year Q4. We are currently waiting for a list of reports from users to complete specifications for this request. We will provide an updated response in April. Need detailed requirements by April 30, 2010 to meet Q4 commitment for FY 2010.

EventMaster®

1. Customer management screen—would like to have customer notes that can be copied to the event and can come up on the requisition sheet (e.g., "Special considerations").

CBORD Response:

Response included below.

2. Would like a small section for post-event feedback. It could end up back in the customer's information, but would like to post it in the event first. Would be nice to

have a tab that would warn you about something, and even post these notes to the banquet event order.

CBORD Response:

Customer Notification

Requirements for Enhancement:

- Can be set at Customer Profile screen.
 - o From Customer management.
 - o From Event Customer management.
- 250-character note-field length—is that long enough?
- Notification will appear when choosing customer for Event or Customer Management wand when opening up an event with Customer.
- Will provide access role to clear Customer Notification.
- Will store and show Create, Modify, and who set notification in Notification window.
- Customer Notification fields available for Watermark™ and Decision Support requests.
- Delivery commitment: fiscal year Q4. We are currently researching and will provide an updated response in April.

3. Be able to order online.

CBORD Response:

This functionality is currently available with the NetCatering® application. NetCatering is a customer-facing tool that allows users to book meeting rooms and order catering for meetings or for pickup or delivery to an office location. The NetCatering application is seamlessly integrated with the EventMaster application, which can also be interfaced to Foodservice Suite® (FSS). A demonstration of the NetCatering application can be provided to ensure that these capabilities are being met. Delivery commitment: currently available through NetCatering.

College & University Foodservice Management Systems

Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



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Top Five Things CBORD Is Doing Well:

1. Support personnel.
 - a. Listening
 - b. Awesome support
2. Software upgrades timely.
 - a. Communication regarding what version is next and when it is coming out
 - b. Timely and often
3. Liked certification classes to get clients to come to UGC but don't want just them.
4. WebEx is awesome!
5. New technical support call center—the representatives are nice, knowledgeable, and clients are getting connected to technicians sooner.

Top Five Things CBORD Could Improve:

1. Need implementation and project follow-up. Also, need better follow-through and wellness checks.

CBORD Response:

CBORD has specific follow-up based on the type of service provided: training, project planning, and diagnostic review.

Once a training session has occurred, CBORD's project managers and implementation representatives deliver a status report to the primary client contact detailing open issues, atypical business processes and notes, and a follow-up task list no more than five business days following training. The client is responsible for completing any outlined tasks or action items prior to the next implementation event.

The Project Plan includes an executive summary, project timeline, project team matrix, database build plan, CBORD system training plan, report cross-reference, risks, and assumptions. The Project Plan is reviewed by the client and the implementation resource is contacted with any questions. The client completes a sign-off form and faxes it to CBORD, confirming that the Project Implementation Plan has been delivered and accepted.

The Diagnostic Review provides a report to the primary client contact summarizing current operations; utilization review of licensed versus implemented software modules, including outstanding services; hardware and database analysis; summary of recommendations; and action plan. We schedule a conference call to review the recommendations and action plan within five business days of delivering the report. CBORD has a Client Relations group that performs wellness checks by contacting clients and inquiring about their status. Clients who feel they need additional training support can make a request to work with the implementation team by contacting a Client Services Manager.

2. Would like communication about updates via email on versions; send update to all end users on all upgrades/changes.

CBORD Response:

Product updates and other valuable information about CBORD's latest releases are available on the CBORD website, <http://www.cbord.com/support/chooserelnotes.asp>. In addition, version release announcements are provided in CBORD's eNewsletter. You can subscribe to the eNewsletter by updating your client profile at <http://www.cbord.com/login/profile>.

3. Sales contacts need to let end users know of system upgrades and new products that might be beneficial to them without clients having to search for this information.

CBORD Response:

We appreciate the feedback and will work to be more proactive in this area. You should also know about additional resources available for this information. System upgrade information is regularly posted via release notes on the client-only area of our website, <http://www.cbord.com/support/chooserelnotes.asp>. This information is also available

in the eNewsletters. You can subscribe to the College & University eNewsletter by updating your client profile at <http://www.cbord.com/login/profile>.

4. Upgrades issues that are known to CBORD: if there are patches available, send them along with the upgrade version—don't wait for the client to call.

CBORD Response:

Your CBORD support technician will discuss upgrades with you and identify potential know issues. CBORD strives to identify and apply patches if there are known issues that could impact all users. However, at times an identified issue may be unique to a particular customer; therefore, a universal fix may not be appropriate or beneficial.

5. Follow-up communication with anyone beyond support is not consistent or timely.

CBORD Response:

CBORD strives to provide exceptional customer service and support throughout our organization. We are currently researching how we can improve follow-up communication throughout our organization to provide enhanced customer service.

Top Five System Enhancements Requested:

1. Add item to menu wizard (needs to be easier to use, i.e., to add an item to global menus).

CBORD Response:

Good, popular request. Delivery commitment: fiscal year Q4.

2. Asking for this for more than ten years: more than a six-day lead time for vendor deliveries.

CBORD Response:

See response below in enhancement request #3.

3. Multiple delivery days for one order day.

CBORD Response:

Both of these requests (#2 & #3) are great ideas for additional order scheduler functionality. In reviewing with the UAC, it was stated by CBORD that these are a lower priority than the planned enhancements to the NetHIMS platform, which is our major focus area for the year. We would like to meet with the UAC during fiscal year Q4 to

better define a project that would provide this functionality in a broader scope. This new project could be prioritized into our development road map for 2010–2011.

In addition, it may be helpful to review some of the commitments we have made to the Corporate & Commercial and Healthcare Foodservice Caucus requests. There are a number of Foodservice and Catering enhancements that should be interesting to C&U customers. For example, request #5 of the Healthcare Foodservice Caucus (set a recipe to locked status—for example, the meatloaf recipe is finalized and locked and only the system administrator has access; security will not work. Delivery commitment: fiscal year Q4) and request #1 of the Corporate & Commercial Caucus (rework the Recipe Cost Report to include the cost of sub-recipes as well as percentage of individual item cost in comparison to whole.

4. Macintosh platform for Foodservice Management Systems.

CBORD Response:

We currently do not have plans for native support for the Macintosh operating system. However, as our applications migrate to the web, Macintosh clients will be able to gain access through the Safari browser. We could provide an overview of the NetMenu® application, which would provide a broader understanding of the development road map for the .Net products.

5. Printing ability to choose where to page break, choose landscape or portrait, choose paper size, and choose recipes to be printed by course as well as inventory and pick lists.

CBORD Response:

In review of this request with the UAC, we agreed to provide a Course Selector for a set of the Kitchen Production reports. Based on UAC feedback, this enhancement would significantly reduce the amount of paper being printed on a daily basis to generate Service Production reports for specific sections of their operation. The UAC will provide a list of Production reports to which to add the Course Selector. Review and agreement on this list of reports to be completed by February 2010. Delivery commitment: fiscal year Q4. Need detailed requirements from UAC by March 31, 2010 to meet Q4 commitment for FY 2010.

College & University Gold Systems
Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



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Top Five Things CBORD Is Doing Well:

1. Bob Lemley's group does a good job of listening to customer needs and working those into the product development program.
2. Phone—talking to help desk is better.
3. Cisco is a good addition.
4. Project managers doing an excellent job.
5. Response time from help desk is good.

Top Five Things CBORD Could Improve:

1. The Accounting Department needs improvement. You can never get a clear picture of what you owe and what has been paid because the invoice numbers and the purchase orders (PO) are never the same or referenced anywhere. Then no one at CBORD can figure it out when you call them.

CBORD Response:

CBORD revised the customer statements about six months ago to show the customer's purchase order number in addition to the invoice number (see Exhibit A attached). Customers are to specify, in their contract with CBORD, whether or not a purchase order is required. If a PO is not required, then CBORD will process an order with a signed quote only and there will not be a PO number on the invoice nor on the monthly statement. When a PO is provided at the time of the order, the PO number then appears on every invoice associated with that order (see Exhibit A attached).

2. If CBORD knows about an issue with a product they should be more proactive and contact customers with the fix.

CBORD Response:

CBORD strives to identify and apply patches to a particular product version if there are known critical issues that could impact all users. This includes notification to the impacted customers.

In addition, issues resolved in a specific product version are documented in the product release notes. The release notes are available on the CBORD website and are outlined in the CBORD eNewsletter.

3. Want to see sales representatives more often. Don't want to pay for a full production license for a test site and don't want to run a test version on my production box. Want a free test database.

CBORD Response:

Sales representatives, their managers, and CBORD management in general are striving to visit customers more frequently. Test systems do carry some costs (hardware, third-party software, implementation in some cases). We want to make test-system licensing affordable and reasonable for those sites with the resources to take advantage of them. CBORD sales management will be happy to review any proposals for test systems to ensure that we are offering our customers an affordable and reasonable solution for a test environment.

4. Problems with cs.cbord.com. Crashes too frequently.

CBORD Response:

The problem has been located and has been resolved. This should not be a continuous problem in the future.

5. Would like access to common fixes to common problems. Would also like to have access to pricing.

CBORD Response:

CBORD is in the planning stage of creating a much more robust online eSupport portal. In addition to the existing case management tools, we are planning to add a

comprehensive product called the Knowledge Base. The Knowledge Base will enable you to conduct quick, precise searches of known issues and access the corresponding solutions. Presently, we are unable to provide a specific target delivery date for the Knowledge Base.

We do not currently publish pricing for our products as the price for a project is dependent on a number of variables. Implementation pricing varies based on the project. Some pricing carries discounts for volumes. Other products are dependent on supporting products in differing quantities for implementation. Pricing is available through your Account Manager or Client Development Group Representative.

Top Five System Enhancements Requested:

1. We need a Peoplesoft Interface XML interface that can be used for Patron Information Transactions.

CBORD Response:

We have had discussions with Oracle regarding an interface to Peoplesoft. We do not expect to have an interface ready for beta testing until sometime after June 30, 2010.

2. Consolidated administrative applications. Right now I have to use three or four graphical user interfaces to configure a single location. Why?

CBORD Response:

After further conversation with the customer, we were able to get a detailed description of their concerns and we will make the following changes:

1. The Copy User Groups utility will be enhanced to include Web privileges.
2. Default User Groups will be added and shipped in future releases of CS Gold® (for example, Dining, Access, Facilities, etc.).
3. Will add user-configurable parameters for default sharing privileges for Schedules, Calendars, and Alarms drop-downs in Report Configuration for Interactive User Groups.
4. You will no longer need to log out and log back in when creating groups in Interactive User Groups. You will simply hit the F12 key to refresh.

We are working on determining dates for these deliverables.

3. A low-cost activity device. We have a large number of users who would love to have something they can use to record activities with but cannot justify the cost of an AERO®.

CBORD Response:

We are in the process of developing an activity device that can be wall mounted and portable. We plan to have it ready for beta testing by July 2010.

4. More functionality on AdminWeb. Want to be able to add/remove meal plans and stored value and credit plans. Want to be able to update patron information. Want a reader status application on the web.

CBORD Response:

CBORD will add the requested functionality to CS Gold AdminWeb. We plan to have this functionality ready by November 2010.

5. More (specifically, less expensive) hardware options related to point of sale (POS) and stored value. Some of our equipment is in the dark ages because the users can't afford to replace the devices.

CBORD Response:

Currently, the AERO device will continue to be our solution for stored value transactions at locations that do not need the full point-of-sale functionality that MICROS offers.

College & University Odyssey Systems
Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



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Top Five Things CBORD Is Doing Well:

1. CBORD Support—getting faster responses, especially when entered online; email with attached case number helps track issue and support progress.
2. Users appreciate that efforts are being made to assign the same support representative to continue working on the same or subsequent problem; they are taking “ownership” of the issues at the site. This is very helpful, as they have the history of the case and the incidents that repeated or followed.
3. Development is making strides to improve presentation and resolution of “long-term cases” or enhancement requests.
4. The new procedure to send a replacement item via overnight shipping to replace a covered piece of equipment helps expedite the solution to issues.
5. WebEx eTools have been a very nice addition to support and training.

Top Five Things CBORD Could Improve:

1. Delays in billing still continue to be problematic. It was mentioned that some were advised that Roper’s new inventory management protocol is to blame. Statements are sent to clients containing accounting codes that are difficult to match. This can be resolved by providing a list of all accounting codes that indicate the product, repair, or service.
 - a. Yearly license and product maintenance bills create a lot of confusion. This is a repeat request from prior UGCs.
 - b. Breakdowns for multi-site institutions are requested again.

CBORD Response:

For contract-related purchases, the billing schedule is dictated by the contract. These are “milestone” invoices that are based on events or dates and do not match shipments of particular items. Customers should refer to the payment schedule in their contract to track the invoicing.

For annual-license and maintenance-fee billing, CBORD sends a letter each March explaining the price increases to be effective July 1. This letter encourages customers to request a quote in advance of the invoice. In addition, customers are asked if they will issue a purchase order for this invoice and, if so, to provide that prior to the billing date. (See Exhibit B attached).

CBORD can work with customers to provide multi-site breakdowns on annual license and maintenance fee invoices. This requires input from the customer to outline which items are associated with which sites. (See Exhibit C attached).

CBORD’s invoices have prefixes to denote what type of invoice they are. CBORD revised the monthly customer statements about six months ago to include generic descriptions based on the invoice prefix (e.g., CTR—Software, Hardware, and/or Services invoice; SUBI—Annual Fees invoice). See Exhibit A attached.

2. Please communicate as early as possible the expected cost or fee increases for products and services. Most institutions need to have final budgets submitted before the release of the ### increase. Please try to assist the customers with their financial planning in this matter.

CBORD Response:

We do try to communicate this information as soon as possible to customers so they may budget effectively. We will continue to be as proactive as possible in this area.

3. Produce eTraining to create mini-sessions like those presented at UGC. The current packages are perceived as mainly a sales tool or a product showcase. Clients will make the time to attend if the sessions deal with “how to” or “to make easier” but are not interested in the “what’s new” kind of presentations for training. They will continue to

participate in those sessions when new products are released to find out what they are, but a follow-up of how they work is what is needed.

CBORD Response:

CBORD understands the request to have additional online training available for Odyssey systems. CBORD's eLearning for Odyssey Systems website offers access to recorded eSeminars and how-tos on common Odyssey training topics. Included in the eLearning are fundamentals of Odyssey PCS Parameters, Patron Administration, and System Administration. CBORD has plans to evaluate our current training offerings. The goal is to provide blended learning opportunities to include online, classroom, and on-site training. Our evaluation and planning is underway. CBORD expects to have an update on our online offerings in March 2010.

4. Keep working to improve the support center. All improvements are welcome and continue to make CBORD a company in the forefront of solution providers. Ensure that if a client leaves specific contact information that it is included in the case and then brought to the attention of the service representative who gets the case.

CBORD Response:

CBORD Support acknowledges that using the correct client contact information is critically important, and we are continuing to develop new methods of ensuring full compliance, including additional training, changes to processes, and in some instances, escalation to managers.

5. Ability to see older case notes that have been closed by support. Occasionally questions arise in IT or administrative meetings that would be easily answered by referring to the case notes provided by the client and those posted by service. If possible, create an archive of case notes that would allow search and view of the older cases.

CBORD Response:

We strongly encourage our clients to use our eSupport web portal for their case management and tracking. eSupport includes the ability to review older cases closed for your site. We appreciate any suggestions you may have for the refinement and improvement to our case management tools.

Top Five System Enhancements Requested:

Odyssey:

1. Ability to add times to the start and end of meal plans. Many clients use dinner on a specific date at the start of the term and lunch at the end of the term. Allowing the assignment of times for start/stop would be greatly appreciated.

CBORD Response:

Currently this can be handled by applying a restriction table to each tender defined in the plan. We will add a plan option that allows the user to enter a plan start and end time by June 2010.

2. Ability to suppress data from reports. Plan membership summary was given as an example but could easily be extended to others to include the terminal listing for those no longer in use but unable to be deleted.

CBORD Response:

We will add the ability to hide specific plans and terminals. Once hidden, those plans and terminals will not be visible in the plan or terminal grid or in most report selection criteria options. We will also add a grid option to "view all" so that hidden plans and terminals can be viewed when necessary. We expect to complete this work by October 2010.

3. The ability to view contents of the database. The only access requested is "view only." This will enable clients to make decisions on what data (if any) is requested to be addressed or removed by Support as needed.

CBORD Response:

Historically we have considered database views the best way for customers to view database records. Database views allow us to make structural changes to the actual database without adversely affecting our customers. We understand that we do not have database views for all tables and we will consider either adding more or opening read-only access to most tables.

4. Ability to enable server clusters and have a true test environment without the requirement to purchase a second license for a live system. Require specific device rules for use on the local test environment to include one register, laundry, terminal, vending, and so on. This will allow a true test of changes made to the site before the primary system is introduced to the change.

CBORD Response:

We will provide formal “warm” failover (limited to Sybase customers) and test system recommendations by May 2010. Test systems will continue to require annual license fees.

5. Ability to set a low balance for accounts that triggers an email to the registered email address of the account. It was also requested as a direct enhancement for ManageMyID® for those clients who are not using the advanced deposit function.

CBORD Response:

We will provide the ability to send an email to patrons when their balance reaches a threshold by August 2010.

MICROS:

1. Clients would like to see the saved system photograph appear when a system card is swiped. They would also like to see the patron name appear on the receipt/tally area of the screen.

CBORD Response:

CBORD research and development has begun researching the best way to transmit the patron photo for display on the MICROS 3700 POS operations screen.

Patron name can be configured to appear on the MICROS operations screen and patron receipt with Odyssey PCS version 4.3 and interface 12.01.01 and higher.

2. Ability to sort by menu item class and then create a report that is exportable with that criterion.

CBORD Response:

CBORD will develop an export by menu class to pull menu item data out of MICROS 3700 so that it can be manipulated and re-imported into the database.

3. Ability to write our own reports or expand reports in MICROS. This was also expanded to include exportation of reports in selectable formats, such as Excel.

CBORD Response:

CBORD now offers MICROS 3700 Transaction Analyzer. Transaction Analyzer is an additional module to MICROS 3700 that provides the ability to export data to many different file formats, including Excel.

4. Multiple scanners at registers. Currently MICROS can support one scanner and one scale. To improve line flow, it would be helpful to have two scanners for each side of the register to create two lines using independent scanners. This enhancement will also allow for the scale to be shared and used at the same time as the scanners.

CBORD Response:

CBORD will investigate ways to provide the ability to use two barcode scanners per POS terminal. If CBORD cannot find a way to provide this capability using a hardware-based solution, we will submit a request to MICROS Systems for a product enhancement to support two barcode readers in the MICROS 3700 POS application.

5. Better database management tools.

CBORD Response:

CBORD will create a document outlining the database management tools that are available for Sybase on a MICROS 3700 server. Using these tools and proper database credentials, MICROS 3700 users are able to create and run queries against the MICROS 3700 database to export information or write custom reports.

Healthcare Clinical Systems
Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



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Top Five Things CBORD Is Doing Well:

1. Webinars
2. Listserv
3. Product upgrades
4. WebEx
5. Focus groups (new product development; see Margaret Dittloff)

Top Five Things CBORD Could Improve:

1. Use the discussion forums more.

CBORD Response:

The CBORD discussion forums are a great way to stay up to date on the latest conversations taking place about your product line or industry of interest. As a customer, you can be notified when a forum you are interested in has a new post by clicking on the check boxes near the forum name at <https://www.cbord.com/support/forum/>. You will begin to receive emails with the new post details each time someone posts something. The forms are also searchable. To familiarize yourself with the benefits of the discussion forum, please view the Discussion Forum Frequently Asked Questions at <https://www.cbord.com/support/forum/faq.asp>.

2. Charges for after-hours upgrades—should be a part of support and Support should be more willing to do upgrades after hours.

CBORD Response:

CBORD Support will work with the client on scheduling installations and upgrades to meet their business needs. We do encourage business-hour installations and upgrades when possible, since this offers the best availability of resources both at CBORD and at the customer site. CBORD will provide on-call support to work through issues encountered when the customer performs an upgrade themselves during non-business hours as part of the annual license fees. However, dedicated assistance during a non-business-hour upgrade may require an additional charge.

3. Better testing of upgrades.

CBORD Response:

Installation and upgrade testing is a critically important step in each version release cycle. During the past year, the CBORD Development and Quality Assurance (QA) teams, using Test-Driven Development methods, introduced several measures that improved the quality of the install/upgrade process:

1. Unit tests
2. User acceptance tests
3. Integration tests
4. Automated tests

Each of these measures allows us to detect both programming and data-specific defects earlier and faster in the development cycle. With each iteration of the testing (and release) cycle, the Development and QA teams gain additional feedback from the results of the various tests. In turn, some of the results drive the creation of additional tests to further strengthen the process.

The test/feedback/modification loop is a continuous process—with the primary goal to improve the overall quality of the upgrade/install experience with each new version released. The development and testing improvements have yielded a significant decrease in the number of reported defects detected during the installation and upgrade process. Moreover, the post-install/upgrade defects have also decreased during the same time period.

Custom modifications and configurations can yield unexpected results during the upgrade process. Recently we introduced an improved tracking process to identify clients who have custom enhancements, reports, etc. The improved visibility allows us to focus special attention on testing of any potentially complicated upgrades.

Although we have introduced a number of significant changes to the upgrade/install testing process, we strongly encourage you to test the upgrade/install in a non-production environment. In the event you discover an issue with the upgrade/install, it is imperative that you immediately notify CBORD Support. The Support team will be able to assist you with addressing the reporting issue, as well as notifying the CBORD Development and QA teams. The feedback provided by you can be incorporated into the creation of additional tests to prevent the issue from resurfacing in future version releases.

4. Bring back Regional User Meetings.

CBORD Response:

CBORD is in the process of reviewing site locations and building a plan to include regional meetings again for clients. More will be communicated regarding these events, including a schedule in March 2010.

Top Five System Enhancements Requested:

1. Room Service printers—missing tickets just disappear. Many issues associated with missing tickets—some show on backup printer but not primary printer.

CBORD Response:

Due to issues reported with the Star Micronics thermal printer/drivers, we are exploring alternative printer choices. There are currently no other wide-format graphics thermal printers on the market, so the alternative printer will require a slightly narrower ticket. Our next step is to identify and work with a beta site to test out the alternative printer in a production environment. Anyone who would be willing to try a 3"-wide version of the printer, please let us know.

2. Carbohydrate exchange on Room Service ticket for each item.

CBORD Response:

This enhancement request has been added to our backlog list. We will schedule this into a future version so that new fields can be added and printed on Room Service tickets.
Target release: October 2010.

3. Want to see when the preference statement was entered.

CBORD Response:

This enhancement request has been added to our backlog list. We will schedule this into a future version so that the Card File Preferences Tab displays the date a preference statement was entered/last modified. Target release: June 2010.

4. Tray Ticket audit date/user ID.

CBORD Response:

Per my notes, this request was to add a Modified On (TLC date/time stamp) column and Changed By (User ID) column to each entry displayed or added to Tray Ticket Notes in the Card File Service Tab. This enhancement request has been added to our backlog list. We will schedule this into a future version. Target release: June 2010.

5. Room Service should have some kind of indicator for supplements on the screen.

CBORD Response:

The Room Service Entry window currently displays an "SUP" as the indicator to the user that the patient has an active supplement order. We will schedule an enhancement to auto-open that View Supplements window when the user navigates to a meal with a scheduled supplement in Room Service Entry. Target release: October 2010.

Healthcare Foodservice Management Systems

Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



Primary User Advisory Council (UAC) Representative

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Top Five Things CBORD Is Doing Well:

1. Support
2. WebEx
3. Email communication
4. Webinars (would you tell us if they will be archived when the session starts and send us the link?)
5. Remote training

Top Five Things CBORD Could Improve:

In addition to the individual request responses, it may be helpful for customers to review the commitments we have made to the Corporate & Commercial and College & University Caucus requests. There are also a number of Foodservice and Catering enhancements that should be interesting to Healthcare Foodservice Management constituents.

1. When training is provided, train us on only the functionality we will use.

CBORD Response:

All representatives should be providing you a draft agenda prior to any training event – onsite or online. They should be providing you detail on training topics. Please ask your representative why they have topics on the agenda, do they see it fitting in your environment. Provide the representative your goals for the upcoming training; tell them what you expect to be able to do when the training is completed. This will help them align the training to your needs.

2. Nutritional databases need to be more accurate.

CBORD Response:

Due to other priorities that have come from Sales over the past couple months; it is likely that this Roadmap plan will be postponed until FY 2011. We would like an opportunity to meet with the UAC to determine a plan as to how we could better satisfy their requirements for an updated and accurate Nutritional database.

3. Accounting system needs improvement—bills are confusing. We should be allowed to name what is on the invoice so both parties understand.

CBORD Response:

Many customer purchases from CBORD are governed by the original agreement signed by the two parties. These sales generally have “milestone” billing terms. This means that invoicing amounts and timing do not match shipment amounts or dates. For example, many contracts call for software to be billed 60% on contract signing, 30% on shipment, and 10% on installation. It is not feasible to list each part number ordered and then multiply it by the percentage being billed. CBORD has implemented a new quoting template that now subtotals the quotes by software, hardware, and services. This will make it easier to confirm the accuracy of a percentage billing. Customers can assist in clarifying the invoices by instructing their purchasing departments to outline the contractual billing schedules on the purchase orders.

4. More webinars on Odyssey and MICROS.

CBORD Response:

CBORD understands the request to have additional online training available for MICROS and Odyssey systems. CBORD’s eLearning for Odyssey Systems website offers access to recorded eSeminars and how-tos on common Odyssey training topics. Included in the eLearning are fundamentals of Odyssey PCS Parameters, Patron Administration, and System Administration. CBORD has plans to evaluate our current training offerings. The goal is to provide blended learning opportunities to include online, classroom, and on-site training. Our evaluation and planning is underway. CBORD expects to have an update on our online offerings in March 2010.

5. Tell us the issues before we upgrade. This is getting better.

CBORD Response:

Your CBORD support technician will discuss upgrades with you and identify potential known issues prior to your upgrade. CBORD strives to identify and apply patches if there are known issues that could impact all users.

Top Five System Enhancements Requested:

1. Make the search the same on Foodservice Suite and Nutrition Service Suite®.

CBORD Response:

Unfortunately this enhancement is not available in FMS with the PowerBuilder development framework. Based on further discussion with UAC representatives we are replacing this request with one to update the data dictionary for Food Production Views. Delivery commitment: target fiscal year Q4.

2. Enlarge font size of printed recipes.

CBORD Response:

We could provide a Kitchen Production report/Sized Recipe with a larger font size. If the desired size of the font can be verified, we could commit to a fiscal year Q4 delivery of this new report. Delivery commitment: fiscal year Q4. Feedback needed by February 2010 to verify font size and confirm commitment specifications.

3. Have archive sort on all screens.

CBORD Response:

We would like additional specifications and use cases for this request before making a final commitment to an enhancement. Delivery commitment: not scheduled. Awaiting UAC feedback. Will provide an updated response in April 2010.

4. Export all reports—Excel, Crystal, PDF.

CBORD Response:

All reports in the system can be exported to PDF via use of a PDF printer driver. CBORD can provide recommendations to popular PDF printer drivers that other clients use. For any customer who needs assistance with setting up a PDF printer driver, CBORD Client Support can assist.

Many reports already have the ability to export to Excel. In general, the ones that do not export do not because they are complex and would require significant development to

provide this capability. Based on the level of effort and current development road map plan, we would not be willing to commit to doing all of the reports at this time. If the UAC could provide a set of prioritized reports that they would like to export to Excel, we could define the requirements and prioritize for the 2010–2011 development road map.

For users looking for Crystal exports, a third-party software, Crystal Writer, can be used to create reports against the available database views that are published within the FMS database.

5. Set a recipe to locked status—for example, the meatloaf recipe is finalized and locked and only the system administrator has access; security will not work.

CBORD Response:

We would like to provide this popular request. CBORD will commit to a fiscal year Q4 delivery. We will need UAC and customer feedback to the use cases to better define the scope and requirements of this project to best meet their user needs. Delivery commitment: fiscal year Q4. We are currently researching this request further and will provide an updated response in April 2010.

Housing Management Systems
Common Interest Group
2009 CBORD User Group Conference
User Caucus Points of Discussion



Primary User Advisory Council (UAC) Representative
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Top Five Things CBORD Is Doing Well:

1. The restructuring that Support has undergone has been good.
2. UGC.
3. Support response time and turnaround has improved.
4. Latest releases are addressing user issues, concerns, and needs.
5. Clients do appreciate that CBORD was willing to restructure the conference due to clients' budgetary needs and concerns.

Top Five Things CBORD Could Improve:

1. CBORD Development/Support could better notify clients when there are patches/updates/fixes that affect all clients. Clients are finding that the level of QA testing has not been adequate due to the amount of bugs, errors, and lock-ups that are still occurring with the product.

CBORD Response:

Your CBORD support technician will discuss upgrades with you and identify potential known issues. CBORD strives to identify and apply patches if there are known issues that could impact all users. However, at times an identified issue may be unique to a particular customer; therefore, a universal fix may not be appropriate or beneficial.

2. Clients are noticing that Development is not releasing new versions as previously indicated (target of one per quarter). A return to the target would be preferred. There is an acknowledgement that this means Development will need to allocate more development time.

CBORD Response:

We are planning for four releases total for ResCenter® and Odyssey HMS™ within the next year. There will also be more frequent patch releases throughout the year. We are looking into some process changes to make it faster and easier to do a release; progress in this area may allow us to do more releases in a given year.

3. Caucus Enhancement Requests: follow up on previous Caucus enhancement requests, including timeline for completion and update on status.

CBORD Response:**These items are included in version 5.0 (target release Q1 2010):**

- CR 0040866: Contact Management email speed—a number of minor enhancements have been made that should help with the speed. However, the main bottleneck is Microsoft Word and that will continue to limit what we can do about the speed.
- CR 0040892: It is too easy to delete an application from the Patrons | Application tab. Prompt to confirm delete is needed to avoid unwanted deletes (University of Washington).

These items are scheduled for version 5.1 (target release Q2 2010):

- CR 0040868: Cancelled Applications in Automatic Assignment (AA). AA needs option to be able to exclude students with cancelled applications.
- CR 0040870: Resaving an Advanced Find (AF) loses Category. When you use categories in Advanced Find to limit access or search scope and you make a change to a “saved” find, it does not retain the Category when you resave it; it reverts back to <General>. So, if you don't remember to select the category again when you save, it will be saved in <General> and users of that AF will not be able to find it where they expect it to be. In other words, if you use Categories, then the Category needs to be saved the same as the Name and Description of the AF.
- CR 0040874: Loading AF doesn't take you to the top of the list. When you click on Load in Advanced Find it should take you to the top of the list of saved AF's instead of to some random saved AF.

These items will be addressed in ResCenter:

- CR 0040894: Notification to student that they have a message to view utilizing WebStudent communication. Similar to CBORD discussion boards' notification.

- CR 0040893: Display location of error when using WebStudent—error can get hidden at the top of the webpage.
4. Support needs to continue HMS and PCS cross-training and CS Access™ Link. Clients are still encountering Support Technicians passing the buck by saying they do not handle/support that particular product.

CBORD Response:

Cross-training is one of the highest priority goals for the CBORD Support team this year. Cross-training between the PCS, HMS, and Webfood support teams has already commenced. It is our hope that the greater knowledge and flexibility gained from cross-training will greatly diminish the possibility of excessive case handoffs between support technicians.

5. Update the User Manual.

CBORD Response:

CBORD understands the request to have the User Manual updated. An update to the User Manual is currently in progress and should be available in June 2010.

Top Five System Enhancements Requested:

1. Provide canned, customized, or the ability to create security reports that will show who is in which permission group and another report detailing all the permissions granted to each group with last log-in date. These reports will help with clients who are required to perform and answer security audits.

CBORD Response:

Target is Q2 2010.

2. Provide web applications for family members. At this time it is not possible to add family members and their relationships via a WebStudent application.

CBORD Response:

Target is Q2 2010.

3. Judicial

- Provide the ability to assign sanctions and then close the case despite sanctions still being open and track the case (e.g., if a student is on probation for year, the only choices are to either close the case or leave it open due to the sanction).

- Provide a method of emailing a notification to staff when a case has been assigned to them.
- Change the “completed” case status when no patron is involved to “case pending.”
- Develop a new sanction variable format for documents that includes sanction name, description, and end date in a row format rather than a column format.
- Add the Police Department Case # as one of the options to the search bar at the top.

CBORD Response:

Target is Q3 2010.

4. Patron Address tab: provide a drop-down list for state and country code (data standardization). Could provide a method of just entering the ZIP code, and the city, state, and country are populated.

CBORD Response:

This will be addressed in ResCenter.

5. Provide a way to hide/delete “old” custom user and saved reports in HMS Report Wizard without asking Support to adjust the database to do this.

CBORD Response:

Saved reports created using the Report Wizard can be deleted. “Old” custom user reports that were eventually added to our standard report set can only be removed by contacting CBORD. The ability to hide or delete standard reports will be addressed in ResCenter.