

ARRC RFP #19-45-207439 - Appendix A: Functional Requirements Worksheet

Functionality	Product has this functionality	Planned for future release (Date)	Vendor will develop custom functionality for ARRC	Product will not have this functionality	Vendor Comments
Module: Crew Tracking and Information					
1) Track Crew Qualifications and Certifications with expiration for: a) Brakemen Trainees b) Trainmen (Conductor) c) Enginemen (Engineers)					
2) View and edit basic employee information (the source of the information will be from corporate HR system whenever feasible) a) Name - Last, First, Middle b) Employee ID c) Birthdate d) Email address e) System User ID f) Contact phone numbers - multiple, type (home, cell, pager), order of preference g) Emergency contact – phone and relationship					
3) View and edit seniority rank and date by craft					
4) Track status and history (assigned craft, layoff/recall, displaced, job ownership, etc.)					
Module: Crew Scheduling					
Leave Request Management					
5) Support electronic Leave Requests for automated approval and notification with validation against business rules and data interfaced from our payroll system including: a) thresholds for allowable absences by Craft and Position b) sufficient availability of leave balances (both current and future accruals), c) crew member seniority standing, and/or					

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d) specific rules as a result of bargaining agreements.					
6) Must have the ability to add leave types that : a) have default accounting codes, b) have a minimum duration, c) indicate whether they are applicable toward Hours of Service calculations d) whether employee is considered rested or if rest is required after leave end.					
7) Trigger reminders or provide report of job bulletins for future extended vacancies/displacements.					
8) Support the documentation of undesirable leave for attendance monitoring programs.					
9) Leave Administration Functionality: a) View and edit leave requests, including in list and calendar b) Manually or automatically approve leave requests c) Display crew leave balance (from external payroll system) d) Validate leave requests against current and future leave balances and warn if insufficient leave will be available e) Provide notifications of leave request approval status f) Track and enforce FRA drug test requirements (i.e. doctor's note, rules examination, drug testing, etc.) g) Generate payroll transactions from leave records into a pending status for review and approval h) Trigger reminders based on business rules					

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<ul style="list-style-type: none"> i) Bulletin job for crew displacement (i.e. going on leave for 14 or more number of days) i) Flag leave types as <ul style="list-style-type: none"> i) Whether or not it has a minimum duration (i.e. none or 24 hours) ii) Whether or not it counts towards HOS (either at leave type and/or specific leave record) iii) Whether or not rest is required after it ends or if upon leave ending they are considered fully "Rested" j) Assign one or more job codes to leave records (as a default for the leave type which may or may not be overwritten within a specific leave record) – this is so it flows to pay transactions correctly and automated. k) Leave of Absence (LOA) and Voluntary Layoffs request/process 					
Module: Job Scheduling					
10) Ability to define scheduled and unscheduled job details and their requirements including: <ul style="list-style-type: none"> a) Repeating Scheduled Jobs b) Unscheduled Jobs 					
11) Effective and Expiration Datetimes					
12) Home Terminal (also Intermediate and Away when applicable)					
13) Road or Terminal					
14) Passenger or Freight					
15) Crew requirements <ul style="list-style-type: none"> a) Crew Types: Conductor, Engineer, Conductor Trainee, Utility b) Crew Type: Required by Day of the Week 					
16) Comments/Description					

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17) Bulletin Number that the job appeared on					
18) For unscheduled jobs (ad hoc, irregular), a) these are for a short duration (one or more days) b) Typically for a single "trip" c) Call time is always approximate					
19) Auto-Call – need to be able to indicate whether a day’s job will have a pre-determined report for duty time and the specified time as decided by the Chief or Terminal Manager. Need to track whether the crew has been notified. These crews do not need to be physically called (same as for standing call but with a variable call time). This can be overridden for a specified day.					
20) Scheduled Train Job Administration - attaching a scheduled job to a scheduled train by day of the week. When daily trains are created based on the schedule, they will automatically be associated with the scheduled job as assigned to the schedule.					
21) Daily Train Job Administration - attaching daily jobs to daily trains (both scheduled and unscheduled), including the attachment of one or more Relief job(s) to a train. For Relief jobs, need to indicate at which Station it occurred. Scheduled trains with associated scheduled jobs will automatically be associated but this can be overridden.					
Module: Distribution of Job Bulletins					
22) Support the generation, administration, and distribution of bulletins for employee bidding for posted jobs as well as track assignments and exercise of seniority placements.					

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<ul style="list-style-type: none"> a) Scheduled job crew assignments and effective dates b) Job train assignments (via Interface to Train Headers and dispatch systems) <ul style="list-style-type: none"> i) Scheduled ii) Daily actual and unscheduled c) Extra Board Roster assignments d) Exercise of Seniority and other placement tracking 					
Module: Crew Dispatching					
<p>23) Support the selection and tracking of train crew “call to work” job details, including notification of required personnel and systems. Support the administration of Extra Board rosters.</p> <ul style="list-style-type: none"> a) Crew details interfaced to Train Dispatch system b) FRA Hours of Service Compliance - Reporting and Alerting c) FRA Electronic Timesheet d) Crew Attendance and Status Tracking e) Call Sheet by Terminal f) Brakemen Trainees 					
Module: Job Crew Assignment					
24) Assign crew members to positions by Job					
<p>25) Assignment details</p> <ul style="list-style-type: none"> a) Ownership Datetime b) Effective Datetime (for Call Sheet, does not mean they are yet available to be called – could be protecting another position) c) Expiration Datetime (will either be set to the Job Expiration datetime or the date ownership ends) d) Source of assignment (Bulletin or Exercise of Seniority) 					
26) Assignment dates must fall within Job datetimes					

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<p>27) Job Assignments Specific to Brakemen Trainee</p> <ul style="list-style-type: none"> a) Crew member is assigned a student or training status for a specified date range (new hire or qualifying run) b) Crew member is assigned to jobs for specified crew type with effective and expiration datetimes (not via bid assign process.) c) Reflected on Call Sheet by position 					
<p>28) Extra Board</p> <ul style="list-style-type: none"> a) List of crew members on call to fill job vacancies by position and terminal <ul style="list-style-type: none"> i) Current positions are Conductor, Brakeman, Engineer; ii) Current terminals are Anchorage, Fairbanks, Seward, Whittier, Healy iii) Employee history is maintained by recording the datetime placed on and off XB. iv) Crew members must be qualified for the position b) For each calendar day, a record is maintained of available crew members assigned to the XB. These are shown in sequence of who is standing to be called for the next vacancy. These crew members will be called to work in that sequence provided they meet all the requirements of being called for a job (i.e. Rested, physically at the terminal, satisfying HOS, etc.). c) Crew members can appear in the XB sequence list and thus be called for duty twice in a day (although with new HOS rules this happens infrequently). Once called for and tied up on a job, their name will go back on the board at the bottom of the sequence list. Once they are 					

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<p>Rested and satisfy all other requirements to be called, they can be called again.</p> <p>d) If they go to the board on that day (rather than at the start of the day 00:01) the time they went to the board must be reflected. (i.e. Exercise of Seniority, Mark up from Leave Status, Released from prior assignment)</p> <p>i) Assigning board sequence is on a “First Out, First In” basis.</p>					
<p>Module: Crew Information Portal</p>					
<p>29) Provide a secure information portal for crews to view operational information and request self-service for routine administrative item</p> <p>a) Call Sheet by Terminal</p> <p>b) Hours of Service statistics</p> <p>c) Leave</p> <p>i) Status</p> <p>ii) Calendars</p> <p>iii) Balances (individual)</p> <p>d) Job</p> <p>i) Descriptions</p> <p>ii) Schedules</p> <p>iii) Bulletins</p> <p>iv) Assignments</p> <p>e) Extra Board roster details</p> <p>f) Seniority Standings</p> <p>i) Exercise of Seniority placements</p> <p>g) Self Service:</p> <p>i) Job Bulletins, bidding</p> <p>ii) Exercise of Seniority – bumping</p> <p>iii) Leave requests</p> <p>iv) Update personal contact information</p> <p>v) Hogbook availability (indicate if willing to take on additional work)</p>					
<p>Module: Timekeeping</p>					
<p>30) Self Service</p>					

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<ul style="list-style-type: none"> a) FRA Electronic Timesheet b) Worked and non-worked hours collection and validation c) Guarantee payments d) Penalty payments <p>31) Approval of Timekeeping Data by Delegate</p>					
Module: Bulletins					
<p>32) Generate daily information about job vacancies and assignments</p> <ul style="list-style-type: none"> a) Uniquely numbered b) Bid open, bid closing and job effective datetimes. c) Operations Manager name d) Last posted Operating Circular by number and date e) Closing bid number f) List all prior closing bulletin assignments by position g) Bulletins close at specified times for a specified length of days, and can vary between bulletin type (special bulletins, yearly, and craft determination) h) List all details for job vacancies. Crew dispatcher selects from list of vacant positions (jobs and extra board) for the effective date based on current or upcoming vacancies (new jobs or displacements i.e leave or layoffs, etc.). Crew dispatcher can edit or supplement job details as posted to the bulletin. Job details include: <ul style="list-style-type: none"> i) Position ii) Road/Yard iii) Home terminal iv) Schedule (Sunday – Saturday) v) Notes 					

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<ul style="list-style-type: none"> vi) Closing Datetime (defaulting to bulletin closing datetime, but user could specify earlier datetime if being re-bulletined) i) List all cross craft transfers (for craft staffing adjustments or crew request with 11d rights) (No longer required with new contract?) j) Bulletin notes or comments k) Bulletins may be amended with versions numbers to correct errors, or provide additional clarifications or allowed changes. l) Bulletins are required to be posted by a specified time, and revisions are only allowed up and to a specified time. Any revisions required after the specified datetime, must be noted on the next bulletin (per UTU contract). m) Ability to delete a bulletin only by authorized user. 					
<p>Module: Bulletin Assignments/Placements</p>					
<p>33) Crew members submit bids for jobs or craft transfer</p>					
<p>34) Upon bulletin close:</p> <ul style="list-style-type: none"> a) Craft transfers are manually assigned b) Senior bidders are automatically assigned jobs. c) If no bids received, crew dispatchers determine force assignments. d) After all assignments have been made: <ul style="list-style-type: none"> i) Crews are notified (per hours of service rules so as not to disturb rest periods) ii) Crew dispatchers review and determine effective release and call sheet assignment datetimes if required. (i.e. travel time for crews bidding to or far terminals, hours of 					

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service requirements, or held on assignment until relief in place).					
35) Seniority Bumps a) Full Bump – job abolishment, markup from leave displacement, being bumped by senior crew member b) Failed Bid Bump (Bump a Man Only) loss of temporary job ownership – two hours to place themselves					
36) A laid off employee assuming a position held by junior employee (also approaching layoff) until a position is filled (relief in place)					
37) Job Abolishment (including Extra Board) and employees affected					
38) Change in Assignment and employees affected					
39) Failed to place self (after losing job ownership due to bump, job abolishment etc.) resulting force (from a bulletin) or default assignment					
40) A crew member exercises their right to return (typically from a force assignment) to a prior position, terminal, or craft for certain specified scenarios					

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