



Statewide Financial System Program Administrator Community Council Agenda/Minutes

Date:	07/13/2016	Time:	1:00pm - 3:00pm
Subject:	Administrator Community Council Kickoff	Location:	SFS Building 5 – Room G08.
Agenda and Minutes Prepared by:	SFS Stakeholder Services Team		
Presentations/attachments	See Administrator Community Council page on SFS <i>Secure</i> at: https://www.sfs.ny.gov/index.php/community-council-list/admin-cc		

Agenda:

Topics	Time
Council Welcome & Introductions <ul style="list-style-type: none"> Council member introductions 	1:00 p.m. – 1:15 p.m.
Council Overview <ul style="list-style-type: none"> Council Charter review 	1:15 p.m. – 1:45 p.m.
Using the SFS - Procurement <ul style="list-style-type: none"> 2016 Summer Update 	1:45 p.m. – 2:00 p.m.
Adapting Agency Business Processes <ul style="list-style-type: none"> Review of Council member survey responses Discussion - Agency experience adapting business processes 	2:00 p.m. – 2:20 p.m.
Using SFS Training <ul style="list-style-type: none"> Review of Council member survey responses Discussion - Agency experience using self-paced training 	2:20 p.m. – 2:40 p.m.
Meeting Wrap Up <ul style="list-style-type: none"> Questions and Answers Suggestions for future agenda topics 	2:40 p.m. – 2:50 p.m.

Attendees:

Mary Alber (SFS)	X	Kimberly Gurga (OGS-BSC)		Lauren Newell (SED)	X
Carolyn Benoit (OGS-BSC)	X	Susan Hedderman (SFS)	X	Courtney Noisette (SFS)	X
Nora Bergeron (HCR)	X	Rebecca Jones (ITS)	X	Karen Nolan (OSC-Finance)	X
Penny Blendell (DOB)		Amy Kahn (SNY)	X	Brefni O'Rourke (SFS)	X
Keith Caldwell (OPD)		Jeremy Kaufman (SFS)	X	John Panariello (SCF)	
Theresa Cary (SED)	X	Joanna Kaufman (DOC)	X	Kristen Pelcher (SFS)	X
Jayne Colangelo (DOT)	X	Aaron Kinberg (DMV)	X	Deborah Poitras (PRK)	X
Grace Cunningham (SED)	X	John Libutti (OSC-Ops)	X	Joseph Rourke (SCF)	X
Alex DeFrancesco (SFS)	X	Cheryl Lozier (DOC)		Laura Roylance (DMV)	
Shawna Denison (DOT)		Dana Makarwich (OMH)	X	Peggy Sherman (SFS)	X
Erika Dobbs (OMH)	X	Scott Masters (DFS)	X	Frank Slade (ITS)	
Wendy Drye (ITS)	X	Betty Jean Mihill (DOH)	X	Kelly Smith (OPD)	X
Kelly Furman (DOT)	X	Deborah Montysko (DCJ)		Carol Stockman (HCR)	X
Moe Geer (OGS)	X	Kimberly Gurga (OGS-BSC)		Ashley Turchiarelli (ITS)	
Corey Geis (OSC-Finance)	X	Srini Murthy (DCJ)	X	Christine Urschel (SNY)	X



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Jennifer Whiteford (DOH)	X			
Mary Woehrmann (ITS)	X			

Action Items:	
Task Assigned	Due Date
N/A	

Notes:

Welcome/Introductions:

- Jeremy Kaufman and Brefni O'Rourke are the SFS Stakeholder Services contacts for the Administrator Community Council. They will coordinate meetings, plan agendas, facilitate meeting discussion, prepare and post meeting notes, and elicit meeting topics.

Council Overview

- Meetings are not meant to be a platform to discuss status of defects and incidents.
- Future meetings should include agency involvement/presentation and SFS encourages the sharing of best practices.
- The councils are not a forum for discussion of Business Cases. If you have suggestions regarding Business Cases, please follow the process outlined on the SFS*Secure* site at: <https://www.sfs.ny.gov/index.php/system-lifecycle/business-case-form> .
- Applicable approved Business Cases have the potential of being discussed at meetings going forward.
- The Administrator Council is currently scheduled to meet bi-annually. The next meeting will be held in January 2017. The meeting frequency of this Council is not set in stone. If there is available content to discuss we have the option to increase the frequency of these meetings.

Using the SFS – Agency Administration

- 2016 Summer Update is tentatively scheduled to be available in production on August 29th; and the 2016 BETA environment was made available on July 11.
- SFS has established a Summer Update SFS*Secure* web page where communications and pertinent information will be posted.
- The new admin features are expected to be available in the Fall.
- Agency SFS Administrators are considered the gatekeepers to the system, system access and data.
- Does password reset work in the BETA environment?
 - **Response:** No, the email automation is not available in the test environment.
- What are other agencies doing to disseminate SFS Quarterly Reports to other departments within their agency?
 - **Response:**
 - OMH places the SFS quarterly report on their internal portal.
 - For those that do not do department level routing, there is a primary permissions list grouping you can parse it by the list.



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- DOH keeps a spreadsheet that tracks all record numbers and what changes were made.

Adapting Agency Business Processes

- Which of the Administrator business process experienced the most amount of change?
 - **Response:**
 - The role mapping process. We had to set up a separate group to set up contracts properly.
 - OMH has a system set up for managing role mapping changes. Their requests for role changes come from their designated facility administrators. They track them as they do them.
 - The portal that OMH uses helps them with monitoring administration.
 - DOH selected staff to deliver training based upon their proficiency with SFS. Each program selected a group of specialists. The specialists from the contract group put on their own training to all of the purchasing groups.
 - DOH expressed that communication of changes and training between departments is important.
 - An agency developed an SFS internal form for use anytime a staff member changes job functions that must be submitted and signed off by the employee and supervisor.
 - **Response:** SFS previously used a Welcome email to advise staff of the roles that were being assigned to them.
- Administrators could share best practices on business processes. Such as getting card holders to reconcile charges. People are not aware that on travel, if you do not reconcile and submit accurate travel within 60 days, it's taxable. This is a good incentive for travelers to submit it correctly.
- Agencies are still working through contract administration business processes. The contract processor roles have been confusing to assign.
- We have staff that we map for inquiry reporting. Does a traveler get access to SFS?
 - **Response:** Yes.

Using SFS Training

- Most who attended today's Council meeting have taken the available Administrator SPTs.
- What are some reasons agencies are not taking the SPT?
 - Somewhat time consuming to go through the SPT.
 - **Response:** SFS advised that agencies can quickly advance through the SPT by pressing the ENTER key.
 - DOCCS is short staffed and they do not have the time to take the training. The procurement SPT training covers a lot of topics and took a long time to run through.
 - **Response:** Staff can quickly advance through the SPTs by using the Try It option and pressing the ENTER key. The See It option will run like a video.



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- There are some issues with getting staff access to SLMS, SFS Secure and moving their roles - especially for staff who move between agencies, and contracting staff. The amount of time it takes to get them access or their roles moved to their new agencies can take weeks.
- Staff does not always take the training. We often run on Band-Aid mode where an urgent matter comes up and we are required to show staff how to do their job.
- There is only one Administrator job aid for the administrator job.
- Current training is awesome for the Level 101 new user. There needs to be Level 201 and 301 advanced training, labs, workshops that cover best practices, ties into the goals of the business area and the actual work that needs to be done.
- How are agencies training staff?
 - **Response:**
 - DOH delivered hands on training to staff. They found it helpful to get staff in communal training rooms to test scenarios.
 - Some agencies are printing SFS screens and creating their own standard job aids.
 - DOH is in the process of creating procedures for onboarding/offboarding that includes steps that need to be done and references job aids.
 - OMH has a more centralized administration process. They have five individuals who manage the process. They use the Administrator training slides from a previous workshop that contained scenarios.
 - The ability to take notes on job aids worked well.
 - OMH is happy to hear back from other ASA's to see that the training has really taken off. They have learned a lot since 2012. They agree that everyone is ready for more advanced training.

Meeting Wrap Up

- This Council is a nice forum to be able to share ideas and to have open discussion.
- Suggestions for improvement:
 - Poll agencies for questions in advance of the meetings.
 - **Response:** SFS encourages Administrator Council members to submit future agenda topics via help desk incident.
 - Consider moving the meeting to the beginning of the day (9-11am) or at the end of the day (2-4 pm) to allow members to either arrive to this location before going into the office or finish out their day without having to return to the office.
 - **Response:** There were meeting room availability constraints for the 2016 meeting schedule. We will revisit this request when scheduling meetings in 2017.
 - Larger agencies and smaller agencies have different needs. Recommend there are breakout sessions at future Council Meetings for agency peer discussion.
- DOH recently had a help desk incident resolved that involved system generated passwords that were sent to them with characters not on the keyboard.
 - **Response:** SFS will look into this and recommends DOH provide examples when this issue occurs.
- Can the individual user do mass email clean ups?



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- **Response:** Kristen Pelcher advised that SFS will take care of mass email changes.