



## Statewide Financial System Program Asset Lifecycle Management Community Council Agenda/Minutes

<b>Date:</b>	6/28/2016	<b>Time:</b>	10:00am-12:00pm
<b>Subject:</b>	Asset Lifecycle Management Community Council Kickoff	<b>Location:</b>	SFS Bldg. #5 – Room G08
<b>Agenda and Minutes Prepared by:</b>	SFS Stakeholder Services Team		
<b>Presentations/attachments</b>	See Asset Lifecycle Management Community Council page on SFS Secure at: <a href="https://www.sfs.ny.gov/index.php/community-council-list/asset-lifecycle-management">https://www.sfs.ny.gov/index.php/community-council-list/asset-lifecycle-management</a>		

### Agenda:

Topics	Time
<b>Council Welcome &amp; Introductions</b> <ul style="list-style-type: none"> <li>Council member introductions</li> </ul>	10:00 a.m. – 10:15 a.m.
<b>Council Overview</b> <ul style="list-style-type: none"> <li>Council Charter review</li> </ul>	10:15 a.m. – 10:45 a.m.
<b>Using the SFS - Procurement</b> <ul style="list-style-type: none"> <li>2016 Summer Update</li> <li>Authorizing Closure of Purchase Orders</li> </ul>	10:45 a.m. – 11:00 a.m.
<b>Adapting Agency Business Processes</b> <ul style="list-style-type: none"> <li>Review of Council member survey responses</li> <li>Discussion - Agency experience adapting business processes</li> </ul>	11:00 a.m. – 11:20 a.m.
<b>Using SFS Training</b> <ul style="list-style-type: none"> <li>Review of Council member survey responses</li> <li>Discussion - Agency experience using self-paced training</li> </ul>	11:20 a.m. – 11:40 a.m.
<b>Meeting Wrap Up</b> <ul style="list-style-type: none"> <li>Questions and Answers</li> <li>Suggestions for future agenda topics</li> </ul>	11:40 a.m. – 11:50 a.m.

### Attendees:

Suzette Baker (OSC)	X	Gregory Grasso (DSP)	X	Kelly Reilly (DOC)	
Scott Bard (OMH)	X	Susan Hedderman (SFS)	X	Nicasio Rios (DHS)	
Olive Coutsonikas (OMH)		Jennifer Huber (OMH)		Lori Rivers (DMN)	
Moss Cail (SFS)	X	Donald Huffman (SED)	X	Tracy Robbins (PRK)	
Neil Cranker (DMV)	X	Emily Jamieson (DOB)	X	Laura Ruehle (OGS)	X
Robert Currier (SED)		Rebecca Jones (ITS)	X	Peggy Sherman (SFS)	X
Denise Davis (SFS)	X	Danielle Kennedy (DSP)	X	Frank Slade (ITS)	X
Alex DeFrancesco (SFS)	X	Ed Killeen (OMH)	X	Laurie Smith (DOC)	
Kelly DeFrancesco (DEC)		Kateleen Martens (PRK)	X	Ashley Turchiarelli (ITS)	
Matthew DeGennaro (DHS)	X	Mike Mezz (OSC)		Patrick Turriglio (DOT)	
Shawna Denison (DOT)	X	Melissa Miller (OGS-BSC)	X	Tom Wood (DOB)	
Owen Devine (OGS)	X	Courtney Noisette (SFS)	X		
Leanne Dlug (SFS)	X	Kathy Phillips (DMN)			
Ben Felts (OGS)	X	Phil Reed (OGS-BSC)	X		



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Action Items	
Task Assigned	Due Date

**Notes:**

**Welcome/Introductions:**

- Denise Davis and Leanne Dlug are the SFS Stakeholder Services contacts for the Asset Lifecycle Management 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.

**Using the SFS – Asset Lifecycle Management**

- 2016 Summer Update is tentatively scheduled to be available in production on August 29<sup>th</sup>; and the 2016 BETA environment will be made available in July.
- SFS is in the process of establishing a Summer Update SFS*Secure* web page where communications and pertinent information will be posted.

**Adapting Agency Business Processes**

- The OGS-BSC business processes have changed to include working with OGS Real Estate and tracking leases.
- Changes in managing the contract module and making sure the terms in the contract matches up with the lease.
- The processes are centralized now which is good because everything is in one place.
- All of the business processes for OGS Real Estate have changed with the use of the Real Estate module and projects. Prior to EE1, RealNet was used for lease management and as a property asset repository. They are now entering leases into the Real Estate module and working with BSC to have the payments generated through OGS Real Estate rent payment schedule which is a new process for them. This change has helped get leases paid on time, and helps when they are negotiating leases. Their challenge is they are the lead agency working to make sure everything works.



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- 34 agencies have leases hosted by the BSC (and managed by OGS) as part of the Real Estate module lease auto-voucher generation for lease payments. Previously BSC was hosting these agency leases, and had to manually pay them, they are now auto-generated.

How are you training staff? / How have your agency business processes changed?

- **Responses:**
  - OGS Real Estate uses a combination of training methods. Internal workshops are being held continuously that instruct staff on how to carry out their SFS related tasks. There were some challenges with timing because all parts of the module were not ready to be used. There was a lag between when training was received and when staff actually used the system.
  - OMH has not been exposed to this module yet.
  - OGS Real Estate as the lead agency had to deal with SFS changes and stabilization efforts. This impacted the way screens look, and their training materials. They found a different experience with how screens looked in September and how they look now. A bit of a learning curve. Internal workshops with staff were helpful for them to show changes as they were rolled out.
  - Still working through all of the OGS Real Estate business processes that interface with SFS. Trying to figure out how to make everything work, lease payments, revenue, etc.
  - Every agency is different. DASNY manages most of OMHs leases, not sure how the relationship with DASNY managing their leases will work in SFS Asset Lifecycle Management.
- OMH is curious about Inventory Management. Is it a mandate or an agency's desire to track inventory? Would be helpful if SFS defines the component. Is it fixed, mobile, a set amount?
  - **Response:** Agencies want to track quantities in order to track needs, and to check items such as tools/cars in or out. Inventory is driven by an agency need, and not by policies you are forced to abide by in order to migrate to a business practice.

### Using SFS Training

Training recommendations/comments:

- Are there canned reports available for ALM?
  - **Response:** Yes. The SFS Reports User Guide on SFS*Secure* provides a listing of available SFS reports, and details for accessing them.
- Make SPT a little more user friendly to navigate (such as, knowing to press enter to move ahead in SPT when using *Try It* may not be known by agencies).



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- **Response:** SFS wants new users go through all the steps to learn, experienced users should be able to navigate through the training using short cuts.
- OGS-BSC uses SFS training materials to troubleshoot and determine if a problem presented to them by an agency user is user error or a system issue. They have also built off of SFS Job Aids and tailored them to their needs.
- OGS-BSC felt SPT would be a good resource to refer customers to for assistance with basic SFS questions.
  - **Response:** SPT should always be recommended as a primary source of information. The Job Aid can serve as a quick reference.

### **Meeting Wrap Up**

- OGS Real Estate is glad this forum is in place to communicate and receive feedback. They would be interested in presenting at future Council meetings, and provide feedback as they bring other agencies into the fold.
- There were some problems with being able to hear on the call.
- All agencies are different. It would be nice to know how other agencies plan to use this module, and what will they be tracking.
- Recommend program and fiscal staff also interact with this group.