



# Asset Lifecycle Management Council

## Community Council Kickoff Meeting



# Opening Remarks

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Peggy Sherman

# Agenda

- Welcome & Introductions
- Council Overview
- Using the SFS – Asset Lifecycle Management (ALM)
- Adapting Agency Business Processes
- Using SFS Training
- Wrap Up



# Welcome & Introductions

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Denise Davis

# Welcome!

- Council members were selected by their Agency Chief Financial Officers
- Identified as an individual who:
  - Understands your agency business processes
  - Uses the SFS frequently
  - Works collaboratively with SFS to share constructive feedback
  - Communicates SFS initiatives back to your agency and host agencies (as applicable)
  - Contributes on behalf of the entire enterprise community
- SFS invited specific agencies to participate in each Community Council, considering agency size, number of SFS users, type of SFS access, module use, hosting relationship, and organizational structure

# Agency Introductions

Agency Name
Department of Environmental Conservation
Division of Homeland Security
Division of Military & Naval Affairs
Department of Motor Vehicles
Division of the Budget
Department of Corrections & Community Supervision
Department of Transportation
Division of State Police

Agency Name
Office of Information Technology Services
Office of General Services
Office of General Services/Business Services Center
Office of Mental Health
Office of State Comptroller
Office of Parks, Recreation & Historic Preservation
State Education Department



# Council Overview

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Alex DeFrancesco

# Council Mission & Objectives

- Promote best practice sharing and enterprise business process consistency while developing a culture of collaboration between SFS and agencies
  
- Each Community Council will provide a participatory forum for SFS users and Subject Matter Experts (SMEs) to:
  - Drive consistency, through discussion of statewide best practices
  - Develop a culture of collaboration between SFS and agencies
  - Increase agency engagement in SFS approved development projects and roadmap activities
  - Support strategic involvement in Change Management and Communications activities

# Council Meetings

Each Community Council should:

- Promote and share agency and system best practices
- Discuss common agency business process challenges and how agencies have resolved these challenges
- Discuss enterprise-wide issues and common concerns
- Discuss future training needs and training requirements

# SFS Business Cases

- An SFS Business Case is a document requesting a new requirement or enhancement to the SFS or agency onboarding to available SFS functionality.
- The SFS Business Case Form is available on *SFS*Secure**.
- Community Councils are not used as a forum for reviewing and submitting Business Cases.

# Council Organization

- Each Community Council is managed by a representative of the SFS Stakeholder Services Team
  - SFS subject matter experts (SMEs) participate as needed
- Stakeholder Services Team responsibilities:
  - Scheduling meetings
  - Tracking attendance
  - Planning agendas
  - Facilitating meeting discussion
  - Eliciting meeting topics
  - Preparing and posting meeting notes

# Meeting Frequency

- The frequency of Community Council meetings is determined based on functional area and operational needs.
- The Asset Lifecycle Management Council is scheduled to occur Quarterly.
- Future Asset Lifecycle Management Council meeting dates:
  - September 28
  - December 22

# Councils on SFS*Secure*

- Community Council Overview page on SFS Secure
  - SFS*Secure* > User Community > Community Councils
- Individual Council pages are accessible from the Overview page, and include:
  - Council announcements
  - Meeting agendas
  - Meeting presentations
  - Meeting notes
  - List of Council members

## Asset Lifecycle Management Community Council

### Description

The Asset Lifecycle Management Community Council focuses on the following functional areas: Asset Management, Lease Management, Inventory, and Real Estate.

### Announcements

Reminder: The Asset Lifecycle Management Community Council kickoff meeting is scheduled for Tuesday, June 28 from 10:00 a.m. – 12:00 p.m.

### Meeting Agendas/Notes and Presentations

- **Agenda: June 28**

### Agenda Topic Recommendations

Is there a specific topic you would be interested in discussing during a future Community Council meeting? Agenda topic suggestions for future meetings can be submitted for consideration through an SFS Help Desk incident ([helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov) | 877-737-4185 toll-free | 518-457-7737).

### Community Council Members

The complete list of Asset Lifecycle Management Community Council members [can be found here](#).



# Using the SFS – Asset Lifecycle Management (ALM)

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Denise Davis

# Asset Lifecycle Management Module Areas

## ▪ **Asset Management**

- Used as a central repository for tracking asset financial information.
- Assets added by OGS and Agencies; agencies can also modify an existing asset's physical attributes.
- Agencies contact OGS for tag numbers, interunit asset transfers, intraunit asset transfers, and modification of an asset's financial information.

## ▪ **Inventory**

- Used to manage and track tangible goods.
- Enables agencies to stock locations with defined optimal item quantities, consume items as necessary, and conduct periodic inventory counts to determine replenishment needs.

## ▪ **Real Estate**

- Used to identify the State's real property assets and manage and track associated costs and revenues.
- Real Estate assets are tracked in SFS using assigned Asset Numbers.
- The SFS associates a Project ID and Project Activity with each numbered asset to account for costs and/or revenues associated with each asset.

# Reminder: SFS Seasonal Updates

- What's included in a seasonal update?
  - Updates and patches provided by our software vendor
  - Successfully tested change requests and defects
- 2016 Summer Update Information
  - Tentatively scheduled to be available in production on August 29
  - Implementation includes vendor updates and patches, a majority of which have no impact on users, and CCB-approved change request builds
  - No system blackout planned
  - A 2016 BETA environment will be available this summer

# 2016 Summer Update Status

## SFS Priorities and Timeframe (June – August)

Complete	<ul style="list-style-type: none"><li>Analyze updates and determine which to include in seasonal release vs. normal release schedule</li></ul>
In-Progress	<ul style="list-style-type: none"><li>Test updates and change requests thoroughly and begin to identify end user impacts</li></ul>
July	<ul style="list-style-type: none"><li>Notify Agency of changes and impacts</li><li>Open a BETA test environment for agencies</li></ul>
August	<ul style="list-style-type: none"><li>Communicate final updates, changes and available training material</li></ul>
August 29	<ul style="list-style-type: none"><li>Tentatively scheduled to be available in production August 29</li></ul>

# BETA Environment Availability

- SFS is committed to communicating changes and what to look for when using the BETA test environment prior to each seasonal update
- A 2016 Summer Update BETA test environment will be available after SFS's thorough review and test of updates
- Environment Details
  - Expected availability: July
  - Data as-of date: April 21
  - Passwords: To be communicated via an SFS announcement
  - The BETA environment will switch to become the “new” Agency Business Process (ABP) environment after implementation
  - Bulkload Notice: The BETA environment will become the primary upon opening of the environment

# 2016 Summer Update Resources

- Dedicated *SFS Secure* web page planned
- SFS self-paced training (SPT) and job aids
  - SPT updated and available in SLMS and Job aids updated and available on *SFS Secure* in August



# Adapting Agency Business Processes

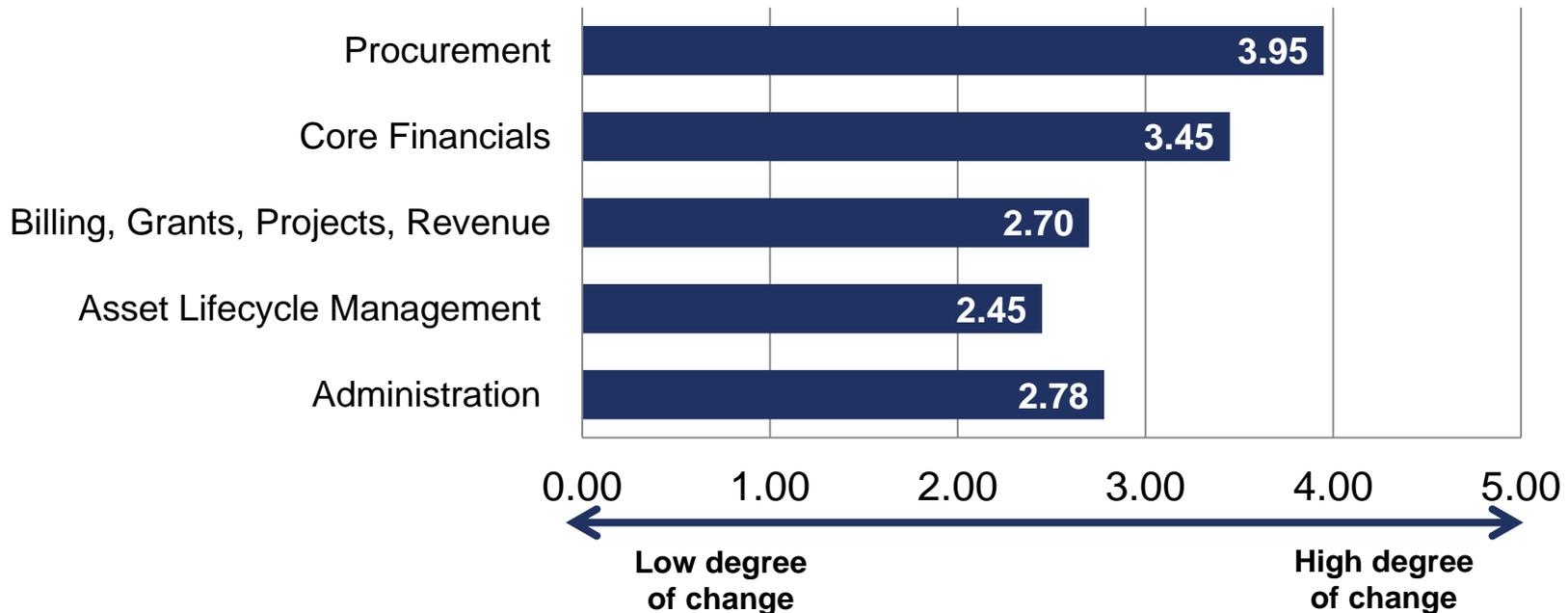
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Denise Davis

# Survey Responses

- Survey responses indicate agencies have experienced the biggest changes to business processes within the **Procurement** and **Core Financials** module areas.

Degree Your Agency's Financial Business Processes Have Changed, Over the Past 6 Months



# Discussion

*Which of the Asset Lifecycle Management business processes experienced the most amount of change?*

*How did your agency implement, communicate, and train agency staff on the change in business process?*

*What lessons learned did you experience, as a result of implementing this change?*

*What business process changes is your agency still in the process of working through?*

# Agency Information Sharing

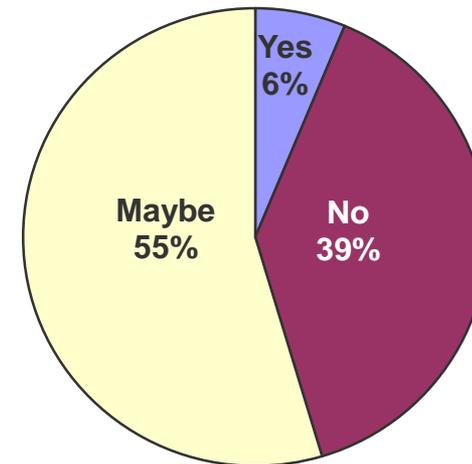
Based on survey responses, agencies believe they would benefit most from hearing from other agencies on the following asset lifecycle management areas:

- Inventory Management
- Asset Management Life Cycle Processes
- Accessing Asset Inventory Data

# Agency Presenters

- A majority of survey respondents expressed a potential interest in presenting at a future Community Council meeting about:
  - Best practices
  - Lessons learned
  - How their agency took advantage of Enterprise Enhancement, Phase 1 (EE1) to improve business processes

Interest in presenting at a future Council meeting





# Using SFS Training

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Leanne Dlug

# Best Practice – Using SFS Training

- Over 40 self-paced training courses, with over 400 topics, covering all SFS modules
- Available through the Statewide Learning Management System (SLMS)
  - SLMS course code: SFS-9.2-SPT
- Represents the core, foundational training for SFS users
- Updated through monthly releases, as system changes

# Survey Responses

- Majority of survey respondents know where to access the self-paced training, and believe that training exists for the types of transactions they work on in the SFS.
- Opportunities exist to discuss suggestions on improvements for self-paced trainings to provide information sufficient for user needs, and to learn more about what materials finance offices are currently using to train staff.

Statement	Response Summary
1. I know where to access SFS's self-paced training.	<ul style="list-style-type: none"><li>• 91% of respondents Strongly Agreed or Agreed</li></ul>
2. Training exists for the types of transactions I work on in the SFS.	<ul style="list-style-type: none"><li>• 87% of respondents Strongly Agreed or Agreed</li></ul>
3. SFS's self-paced trainings provide information sufficient for my needs.	<ul style="list-style-type: none"><li>• 68% of respondents Strongly Agreed or Agreed</li></ul>
4. My agency trains finance office staff using SFS self-paced training materials.	<ul style="list-style-type: none"><li>• 63% of respondents Strongly Agreed or Agreed</li></ul>

# Discussion

*How could the self-paced trainings be enhanced to provide more sufficient information for your needs?*

*What is your agency's current process for training staff on how to use the SFS?*

*What material does your finance office currently use to train staff on how to use the SFS?*



# Wrap Up

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Denise Davis

# Discussion

*What do you think worked well for this kickoff?*

*What do you think could have been improved?*

# Suggesting Future Agenda Topics

- Agenda topic suggestions for future meetings can be submitted for consideration through an SFS Help Desk incident
  - [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov)
  - 877-737-4185 (toll-free)
  - 518-457-7737

# Meeting Attendance

- Primary members are expected to attend each Community Council meeting.
- Alternate members may attend, as needed.
- Please do not forward the meeting invitation.
- If you believe an additional participant from your agency needs to attend a Council meeting for a specific reason, please notify SFS via SFS Help Desk Incident.

# Questions and Answers