



# Statewide Financial System (SFS)

Key Stakeholder Meeting

Tuesday, July 20<sup>th</sup> 2010

# Agenda

- Moving Closer to SFS “Go-Live”/Agency and SFS Involvement
- Experience the SFS
- Role Mapping and Next Steps

# **Moving Closer to SFS “Go-Live”/** **SFS Support and** **Agency Involvement**

*Mahesh Nattanmai (SFS Business Operations Manager)*

# How is the SFS Program Supporting You?

There are 255 days left until SFS “Go-Live” April 1, 2011!

- **Info sessions – All agencies**
  - Each focused on a single topic area
  - Help the SFS Program develop your agency’s task list and build input for your agency’s program
  
- **Q/A meetings – All agencies** *(any agency staff may attend)*
  - Address agency issues/questions related to SFS technical and business areas
  - SFS Program SMEs available
  
- **One-on-one meetings – Phase 1 agencies only**
  - Focus on agency-specific deployment needs
  - Help Phase 1 agencies to prepare for SFS implementation

# SFS Agency Q/A Sessions – Common Themes

## Financial Processes

- Transaction Error Processing
- Contract Bulkloading by Future Phase agencies
- File Layouts for AR/Billing
- Summary of Supported Transactions
- Tie Legacy Reports Back to New Reports

## COA/KK

- Process for COA/KK Governance

## Agency Interface

- Agency Certification Test Scheduling
- New Source System Identifiers

## Statewide Vendor File

- Managing Existing/Foreign Vendors
- Final Vendor Data to OSC for Conversion
- M131 File Content

## Deployment

- Future Phase Training Plans
- System Testing Roles

# Upcoming Agency Engagement Points

## July: Agency Engagement Points

Meeting	Type	Timing
Round 2 COA Cost Center Mapping and KK Kick Off	Info Session	July 19 <sup>th</sup> – 21 <sup>st</sup>
AR/Billing Configuration Kick Off/Conversion Status	Info Session	July 26 <sup>th</sup>
SFS Program General Info Session	Info Session	July 26 <sup>th</sup>
Round 2 Agency KK Meetings	One-on-One	July 26 <sup>th</sup> –September 2 <sup>nd</sup>
Training Liaison Kick Off	Info Session	July 28 <sup>th</sup>
AR/Billing Q/A Sessions	Q/A Session	July 29 <sup>th</sup> and August 3 <sup>rd</sup>

# Upcoming Agency Engagement Points

## August: Agency Engagement Points

Meeting	Type	Timing
ID Conversion/Interface Needs Meetings	One-on-One	Weeks of August 2 <sup>nd</sup> – August 30 <sup>th</sup>
Customer Data Base Kick Off	Info Session	Week of August 9 <sup>th</sup>
Key Stakeholder Meeting	Info Session	August 17 <sup>th</sup>
Agency Role-Mapping Workshops	Info Session	Week of August 23 <sup>rd</sup>
Vendor Maintenance Kick Off	Info Session	Week of August 23 <sup>rd</sup>

# What the SFS Program Needs From You?

- Round 2 Cost Center Mapping and KK Design
  - Schedule a work session with the SFS Program
    - July 26<sup>th</sup> to August 10<sup>th</sup> to update reporting trees
    - August 2<sup>nd</sup> to August 10<sup>th</sup> to update agency KK trees
  - Submit all Round 2 materials by September 3<sup>rd</sup>
  - Map all active cost centers as part of Round 2
  
- Accounts Receivable/Billing
  - Submit configuration exercise by August 12<sup>th</sup>
  - Submit completed data extract files for mock conversion by August 19<sup>th</sup>
  
- System Testing
  - Recommend additional system testing scenarios by August 31<sup>st</sup>
  - Contact Organizational Readiness Liaison to schedule agency bulkload certification testing
  
- Training
  - Develop a training plan/schedule related to end-user training

# Experience the SFS

# SFS User Experience Introduction

- What you are about to see is...
  - An early look at the SFS (currently under development) from an agency user experience
  - Not exactly what the SFS will look like in production
  - A work in progress
- This is **NOT** a training session
- This is **NOT** a design session

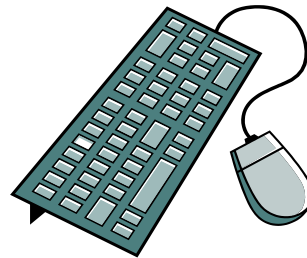
# Your SFS User Experience

- Your user experience will depend on your **SFS user role**
  - Based on your agency/business unit
  - Based on your job functions in the SFS (e.g., Accounts Payable, General Ledger, etc.)
- **Phase 1** agency users will have full SFS functionality available based on their SFS user role
- **Future Phase** agency users will have less functionality available in the SFS, but will access it exactly the same way as Phase 1 users

# User Experience #1

## Scenario: Phase 1 agency user

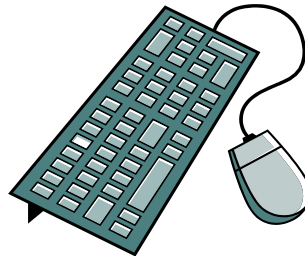
- Phase 1 agency users log-in through the SFS Portal
- Once in the SFS Portal, users can access the following through single sign-on:
  - SFS Financials – This enables the user to access a set of menu items needed to complete their job functions such as Accounts Payable, General Ledger, or the cost center profile screen. The business traveler can access the Travel and Expense Center through Employee Self-Service
  - SFS Reporting – This enables the user to access the reporting dashboard
- Demo



# User Experience #2

## Scenario: Future Phase agency user

- Future Phase agency users log-in through the SFS Portal
- Once in the SFS Portal, users can access the following through single sign-on:
  - SFS Financials – This enables the user to access direct-entry screens and the cost center profile screen
  - SFS Reporting – This enables the user to access the reporting dashboard which contains a limited number of reports
- Demo



# **Role Mapping and Next Steps**

*Michael McDermott (SFS Training & Communications Lead)*

# Coming Soon: Role Mapping

- Roles enable end users to have SFS security access to the parts of the system that they need to use for their daily work tasks
- Roles define the training end users receive
- Roles are system-based and correspond to the job tasks performed
  - Roles are **NOT** job descriptions
  - An employee may have one or many SFS roles
- SFS Business Functional Leads and Extended Team workgroup will review and sign-off on standard functional roles
- Agency Business and Security Liaisons will map their agency end users to these standard functional roles
- Functional role definitions will include:
  - Description of the role;
  - List of SFS job tasks the user will perform;
  - Related business process flows; and
  - Roles that cannot be assigned to the same individual.

# Role-Mapping Tool: Due Aug/Sept

- Agencies will be provided with an Excel template
  - Each end-user name must be entered in it
  - Agencies will indicate which functional roles end users should have by placing an 'X' in the appropriate column for that role

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Bureau / Department	Last Name	First Name	Job Function	Civil Service Grade	Email								
2							Budgeting		AR and Billing					
3														
4	Accounting	Appleton	Sue											
5	Accounting	Barker	Bob											
6	Purchasing	Doyle	Arthur											
7	Purchasing	Greene	Richard											
8	Receiving	Grimley	Ed											
9	Purchasing	Stein	Ben											

# Role-Mapping Next Steps

Activity	Timing
SFS Program distributes Role-Mapping Kick Off materials (handbook, guidelines and role descriptions)	8/10
Role-Mapping Kick Off sessions: (Agency Coordinators, Workforce Transition Liaisons and Agency Security Officers)	Week of 8/23
Agencies map end users to SFS roles	8/30 – 9/28
SFS Training Team and Agency Training Liaisons use role mapping to assign end users to training classes	Late-Fall 2010

# SFS Agency Next Steps

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- Vendor Maintenance Kick Off: *Week of August 23<sup>rd</sup>*

**For more information on Agency Meetings, visit “Quick Links” at:  
<http://www.sfs.ny.gov>**

# Future Key Stakeholder Meeting Topics

Date	Planned Topic Areas
8/17/2010	Mock Conversion Tests, Training Development, ID Conversion/Interface
9/21/2010	COA Conversion/Testing Feedback, Agency Implementation Guide – Operations Information, Role-Mapping, Data Clean Up
10/19/2010	KK Trees Test & Feedback, User Acceptance Training, Contingency/Cutover Planning, Role Mapping, Validation Interface Certification
11/16/2010	COA Process Control for New Values, Agency Interface Bulkload Certification, Train-the-Trainer
12/21/2010	Master Vendor File, Training Logistics, Execute Conversion

**Should these meetings be twice monthly as we get closer to “Go-Live”?**

# Questions

