**Transcript**

July 8, 2025, 5:57PM

 **Jonathan Aulson** 1:20  
Hey, folks.

 **Beamesderfer, Chad** 1:46  
OK.  
Hey, Jonathan.

 **Jonathan Aulson** 2:04  
Hey, was that Chad? Hey, Chad. How are you?

 **Beamesderfer, Chad** 2:05  
How are you?

 **Jonathan Aulson** 2:09  
Doing well.

 **Beamesderfer, Chad** 2:10  
Good.

 **Jonathan Aulson** 2:11  
Yeah.  
Yeah, you're you're West Coast, Chad. Do I remember that?

 **Beamesderfer, Chad** 2:24  
Yeah, that's correct. Yeah. So Cal.

 **Jonathan Aulson** 2:26  
OK.  
Nice.  
Well, we got a good demo today. I think you guys are going to appreciate this one. A lot of good work to show off.

 **Beamesderfer, Chad** 2:48  
Nice.

 **Esposito, Ryan** 2:50  
Yeah.

 **Jonathan Aulson** 3:03  
Give everyone just another couple minutes here to trickle in.  
Hey, Amy.

 **Sowells, Amy** 3:18  
Hey guys, how's it going?

 **Jonathan Aulson** 3:22  
Well.  
Right.

 **Sowells, Amy** 3:34  
Hey Mike, did Adam have the baby?  
Oh, Ryan, anyone?

 **Esposito, Ryan** 3:41  
I I do not know. I know he's been out.

 **Foy, Michael** 3:44  
Yeah, I I haven't heard from him since last night where he said tonight's the night, so waiting for more info, yeah.

 **Sowells, Amy** 3:49  
OK.  
Wow.

 **Boyer, Jim** 3:53  
Wait, Adam's having the kid?

 **Foy, Michael** 3:56  
Yeah.

 **Boyer, Jim** 3:56  
Like God, I'm getting old.

 **Sowells, Amy** 3:57  
I know. Isn't that crazy?

 **Boyer, Jim** 3:59  
It's just like, what? I'm like, oh, God, actually gonna tell me Rosetta is like, you know.

 **Esposito, Ryan** 4:00  
I know.

 **Foy, Michael** 4:01  
Yeah.

 **Sowells, Amy** 4:06  
Yeah, I haven't heard that name in a while.

 **Boyer, Jim** 4:07  
Blast of the past.

 **Esposito, Ryan** 4:09  
Blast from the past, yeah.

 **Boyer, Jim** 4:13  
Russian, I mean.

 **Sowells, Amy** 4:14  
I think she was due like later in July though, so I'm sure he was a little caught off guard.  
But anyway, Jonathan, he probably won't be on the next week or two.

 **Jonathan Aulson** 4:25  
Yeah.  
Got it. Excuse me. Well, that probably means we've got everyone we're going to get, I'm guessing. So let me go ahead and get started. We are here for Sprint demo of Sprint 28.  
We had an excellent Sprint. We built out this in this past Sprint, the billable accounts portion of Internal Revenue on the P&L. We also picked up the per labor hour Internal Revenue on the P&L.  
Today we're going to look at the some usability enhancements we put in place for the statistics page, as well as kind of increasing the number, the amount of statistics that we present and save at one time.  
We're gonna look at the job group management feature that we built for the on the kind of the admin side of the system, which lets us map job codes to job groups and sites.  
And we're gonna see the actual, like the budgeted and actual payroll data coming in from Legion alongside the forecasted and budgeted data as well. All told, we we accomplished 70.  
6 story points this Sprint, which is a new record for us. In fact, this is almost double the velocity that we typically see. The team has successfully kind of implemented some AI based tools in our workflow.  
Which has really paid off. So we're hoping to see continued kind of increased velocity moving forward.  
Any questions for me on the scope of Sprint 28 before I start demoing?  
Very good. So I'm going to start off in site 0170 and this is the site statistics page. You'll see there's a couple differences here. So first of all, I've got my starting month set to July, so my first row is July 1st.  
Now we're loading actually three months of statistics data at once. So you'll see I can navigate through the months through September. This will help support that kind of 90 day forecast process, letting an account manager kind of edit without interruption all 90 days of statistics.  
And save once to save it all. So that's that's one feature. We've also got some enhanced usability of the page. Excuse me, you can see by my focus is on this cell.  
And the contents are highlighted. And so one of the improvements we made was every time we change focus of a cell, it's highlighting the content of that cell so that you can the very first keystroke you make is gonna input a number into the cell.  
So that's that's just kind of speeding up the ability to input data. We also are we've got a a kind of a cool feature here, so I'll show you an example. So starting from maybe from like a Friday.  
The idea is we can have account managers inputting kind of a pattern of data across their week. Make that 90.  
And whatever amount or whatever values they put in here.  
We can now multi select and copy and paste. So we've got you have to get permission for the for the clipboard there, but so now they can kind of input a week's worth of data and paste it down the row, which I think is going to be really helpful.  
You'll also notice here when I have my my mouse over the box that that double arrow is showing that I can I can copy or select multi cell select up or down. It does not let me select sideways so we don't we don't have any danger of kind of.  
Pasting across columns on accident.  
So that's that feature. And then of course, as I mentioned, we were able to now save all and that saves 3 months of statistics at a time. So now I'm just gonna kind of set this.  
I'm leading up to a demo on the PNL, but you'll notice as I kinda set rates here. Oops, I'll make that to be 68.  
As I set these rates I can we've we've implemented this multi-cell copy across all the the pages that have data tables. It's you know some are more useful than others, mostly the stats page, but that is a feature on all of them. I'm just going to update these rates so that when we get to the PNL we can kind of see that as well in August.  
And then the next thing I want to show is in the admin panel. So before I head over there, any questions for me so far?  
So the the feature to talk about here is job group management in the admin section and this is where we're tying individual job codes to job groups and sites. And the way this works, let me kind of go through each section here because there's a lot on this page, the job groups.  
Card here is populated by automatically. We're pulling in job codes off the out of Workday data, the same data that's sent to Legion, and we're using that data to associate the job code to a particular.  
Site, but in order to kind of roll those codes up into groups, we have a section here to create groups and associate job codes to those groups. Now we've actually already Amy and Adam have completed the mapping of creation, mapping of all these job groups, so we've loaded that data in.  
But you can see or you can imagine kind of as new job codes get added to the system, you can come to this panel, the admin panel and search for like a new job code and a new code is defined as a job code where the job title is the same as the job code.  
And so we don't, we don't assume a job title here. What we're doing is pulling in just the job code, and then we let the admins of the system come in here and edit the job code to set the job title. So once that's set, that new tag goes away.  
And then unassigned this is. This means basically that the job code doesn't belong to any group, which kind of makes sense for these because it looks like these particular job codes, while they're in the Workday data, they're not actually associated to any site. So these are probably old codes.  
That could be purged from that that work day data if if you guys want to. Anyway, so that's that's kind of how the job codes work. And then of course as as new job groups are needed, we can come here, create a new group, excuse me, which just needs a title.  
And then you can use these icons to edit the group associations of job codes, etc. Once a job code is in a group, the sites associated with those job codes automatically pick that up because we already know.  
Which job codes are at which site. So you can see like for 170 here we already have these groups assigned and each of these groups will have the the job codes for the site.  
Hopefully that kind of made sense. Any any questions from anyone on this one?

 **Esposito, Ryan** 13:07  
So is so an admin would go in there and kind of scrape that list and then would map a job group to that job title. I probably messed those names up. Is that is that kind of the plan?

 **Jonathan Aulson** 13:23  
It is. So essentially all the work has really probably been done for quite a while until you guys get new job codes, right?

 **Esposito, Ryan** 13:29  
A new one, I guess that's what I'm referring to, OK.

 **Boyer, Jim** 13:31  
Well, I I I think that's our concern.

 **Esposito, Ryan** 13:34  
Because unfortunately, yeah, it's it could happen. So someone will have to scrape that list occasionally.

 **Jonathan Aulson** 13:34  
Then oh.  
Yeah.  
Yeah, you would want someone to kind of come here and and check for new codes. I would recommend. I think we should take a look at whether we can purge these codes out of the work day table that we're using. I I think if we can, that would be a good step so that it's really only.  
Truly new codes that get pulled in here and so that would be the process coming here looking for new codes and then associating them to to the job group. Now anyone at Town Park could be responsible for this we could set up.

 **Boyer, Jim** 14:07  
Mhm.

 **Esposito, Ryan** 14:08  
Mhm.

 **Jonathan Aulson** 14:15  
Any like maybe if this is a more of a an HR function to do this, they they would be able to log in and and perform these actions. It's up to you guys.

 **Sowells, Amy** 14:26  
Yeah, it's probably gonna be like an atom or.

 **Esposito, Ryan** 14:27  
Yeah, Amy.  
Uh huh.

 **Jonathan Aulson** 14:30  
E.

 **Boyer, Jim** 14:30  
Yeah, but.

 **Sowells, Amy** 14:31  
Or probably not HR, but yeah, Jonathan, I think it's good to scrub this. So we're like always just looking at like the freshest new ones. So could we just make that a step somewhere pre go live?

 **Jonathan Aulson** 14:46  
Yes, we'll have to get the, I believe this is the HRAS team that is pushing this data. So we'll we'll need them to clean that up. But yeah, I'll I'll mark it down for us to follow up on.

 **Boyer, Jim** 14:58  
Yeah.

 **Sowells, Amy** 15:00  
Great.

 **Gonia, Tia** 15:00  
Looking at some of those codes, Amy, some of those are being used like the the VMPTCO at concierge one, the visitor management concierge that's used.

 **Boyer, Jim** 15:00  
I'm alone.

 **Jonathan Aulson** 15:12  
It may be that if it's used at a site that's not yet been added to Power Bill, that would also explain it, Yep.

 **Sowells, Amy** 15:16  
Exactly.  
Exactly.

 **Gonia, Tia** 15:19  
Yeah, it's one of the. It's one of the Baylor sites.

 **Jonathan Aulson** 15:21  
E.

 **Boyer, Jim** 15:21  
Is it also John? Does it only consider per labor hours in this situation when it's looking at sites or is it all sites?

 **Jonathan Aulson** 15:27  
It's all sides.

 **Boyer, Jim** 15:29  
OK, I like I I mean, I I get what you're doing and I like it, but my concern is on our end. Like let's just say Adam was doing this right in his job. He he'd have to like really essentially go in there like every day to make sure that there's not like a miss if we want accuracy. I don't know that I like that, right?

 **Gonia, Tia** 15:48  
So there's currently right now we have to manually add every new job code entitled to Legion. So Wagefield sends an e-mail to the workforce team. So technically we could just add Adam to that e-mail and then we'll know that a new one's been added.

 **Boyer, Jim** 15:49  
Because.  
Good.

 **Sowells, Amy** 16:04  
Yeah, I like that.

 **Gonia, Tia** 16:06  
So there's already kind of a process for that, just for another system, so I don't see any harms adding one more person.

 **Boyer, Jim** 16:08  
Yeah, well, I think well.

 **Sowells, Amy** 16:10  
Right.

 **Boyer, Jim** 16:12  
Well, I I think we also on our end have a real lead for a variety of reasons to start standardizing and consolidating some of this stuff, but that's that's a ball for another time.

 **Smith, Jeremy** 16:20  
Yeah, look that.

 **Gonia, Tia** 16:20  
Yeah.

 **Smith, Jeremy** 16:22  
Well, we'll we'll we'll probably reduce job codes by about 145 in the next six months. Just give chatting myself some time.

 **Gonia, Tia** 16:22  
That's the difference.

 **Jonathan Aulson** 16:37  
All right, guys. Any other questions or thoughts on the job groups?  
So next I'm gonna show kinda where these are used. Let me make sure I've hit all the points here. Oh, inactive. So I do wanna mention that one of the ways we use these groups and codes is for payroll forecasting and so in.  
And we'll look at that in just a second. But for the scenario where a job group has been or job code has been used at a site, but then it it needs to go away, right? For whatever reason, it's no longer gonna be used at that site.  
We don't want to actually delete it from the system because we we want to maintain that historical data showing that the job you know had had hours and costs there. So we have the ability to deactivate and kind of archive is the idea. So you can archive both.  
A job code and or a job group. The only rule is that for a job group to be deactivated, all of the job codes within it have to be deactivated. But once you do that, you you're essentially controlling whether it's visible.  
In the forecasting side on in the in the payroll section for for that site. So we're we're able to kind of maintain the historical data, also control what the account managers are seeing so that there's no no data loss and no confusion.  
So let's maybe take a look at that. I'm going to go now to still on site 170 here, we're going to go forecast payroll and so first kind of starting in July here.  
I'm going to show the actuals and budget. I'm sorry, actuals and scheduled data coming in from Legion alongside the forecasted and budgeted data that we already have. So here's an example the first week of July we've got.  
Scheduled amounts coming in at 132 hours on this day. The actual amount was 142.5 hours for these jobs. One thing to note and we we have this that we're we're working on now, but there is a bug right now, the scale.  
Of these two sides is not matching. So you can see like this side is is 44 1/2 hours, but the size is much greater than this bar which is 142 hours. So we're cleaning that up. It's on our list, but just wanted to mention it when we kind of drill into these dates.  
We can see the job groups are the first level, and so this is what most site account managers will see. It's just, you know, each of these job groups that we've defined over in the job group management and they'll be able to click on them.  
And forecast payroll for these groups. Some of them are are not pulling in budget data yet, and that's because there's an effort right now to map the budgeted job profiles.  
Over to the job codes so that we can actually kind of connect the dots between the forecasting system and budget data for the for the job codes that where the where the job profile doesn't match. Anyways, we've got that mapping completed. We just need to kind of implement it now so that so very next Sprint.  
We should see all of these bars filled with actual or the the budgeted data.  
Let's see what? Oh, so the the other just piece, right. So when we oh, let me expand one that actually has data. So if I were to expand GSA, we can see guest service, guest service associates are, you know, budgeted at 28.7 hours.  
And we're forecasting exactly on budget so far. So there's been no change here. We can click into the oh, this is a past date. I need to move weeks here to a future date and we can.  
Then actually forecast. This is at the job group level. For this site they need to go into the job code level and forecast.  
Uh for.  
Job, the GSA job. So we have a button in here to reset to budget value. If we had changed this to a different amount, we could actually just click that update forecast. We kind of need. We would need to go through a few of these and set the forecast. We're just going to hit a couple.  
couple over here. Uh  
And then save. I also want to just kind of show you guys starting on a future month so that we can see the PNL update.  
Here we'd we're looking at August and just coming in to these GSAS and setting a value for.  
The future months.  
Let's see, I'm. I'm just now realizing why there's not a Fort. I'm in this. I mean, I did. I forgot to configure this site in the UAT system for for labor hour. I'll have to swap URLs here in a second. Anyways, OK, so the.  
That is budget forecast, scheduled and actual data. Also on the budgeted, I'm sorry, scheduled and actual for July. Forgot one piece to show you guys.  
As this mouse over so we can show now we have the scheduled and actual data kind of coming in. You can you can see that summarized in a little tool tip. OK, I think I hit all the the pieces there. Any questions for me on the legion data showing up in payroll?  
Very good. OK, I'm going to need to switch to our dev site now.  
Uh, I had.  
Prepped for this demo in the dev site and then I switched over to the UAT site and and I forgot to make one configuration change, so I'm just switching back here to show that.  
So here in the dev site, site 170 is configured as a per labor hour site as well and so we can show for payroll.  
In August.  
So here as I go in and expand down to the job code level, this is where we're we're sort of enforcing that for per labor hour sites they they forecasted the job code level and that's the piece I wanted to show also.  
As I make a couple of these updates, I'm gonna save this and then we'll head over to the PNL and see all this stuff kind of come together.

 **Esposito, Ryan** 24:43  
So the site's a hybrid and it's let's say a revenue share and then we can bill certain hours. Does that, does it know those positions from the from the invoice template to know which ones are gonna be revenue generating?

 **Jonathan Aulson** 25:00  
It does. If there's any, if there's any kind of per labor hour rates, then they're going to have to forecast all of their roles at the job code level, at least for now.

 **Esposito, Ryan** 25:00  
OK.

 **Jonathan Aulson** 25:14  
But yeah, we do take into account like for example, if it's a management agreement and the management fee is charged as a per labor hour agreement, even though there's not a per labor hour kind of contract, we still incorporate that into Internal Revenue.

 **Esposito, Ryan** 25:32  
Yeah.

 **Sowells, Amy** 25:32  
Yeah, the only ones that are not going to pull because they're not built in power bill are the unique per labor hours where contractually it says something like we can only bill hours above 150 a week. In that case, we can't bill as a typical per labor hour, right, because we can't just pull the hours from Legion.

 **Esposito, Ryan** 25:46  
Mhm.

 **Sowells, Amy** 25:51  
So those hours are tracked on the revenue spreadsheet. So something like that would need to be forecasted manually. There's not a ton of those, but yeah, it would need to be forecasted in like the other Internal Revenue section.

 **Esposito, Ryan** 25:52  
Mhm.  
Other Internal Revenue, OK.

 **Sowells, Amy** 26:05  
Yeah, exactly.

 **Jonathan Aulson** 26:10  
So I'm I'm just reloading the page on the P&L view so that I can kind of show you guys the breakdown of data we are planning to. So you'll notice like the current month here in July.  
You know is if you thought there were it's kind of missing data and it's you'd be right. We've we're showing the actuals but not the forecasted amounts in our current month. That's a story we're gonna hit probably next Sprint.  
So to really kind of show what's going on here, we can look at our APIs. So within the forecasted data, I'm gonna go to month 8, sorry, Internal Revenue and then month 8 and that's August.  
So here we can kind of break down the components of Internal Revenue for the month for this site. So here you can see for billable accounts we've got amounts pulling in. This is using the power bill contract configurations.  
So it looks like this site has an additional payroll amount that they that they charge. We we're showing the expense accounts here totaled PTEB. Let's look at that one. Looks like for this site they probably charge actual PTEB or at least that's the configuration.  
And support services are included. So all of this is kind of wrapping up for billable accounts as this number and then we can see the other components as well. So like fixed fee, there's an amount here of fixed fees and an escalator it looks like configured.  
Management agreement is being developed in the current Sprint, so that's not quite ready, but we also have per labor hour and preoccupied room on this site. So as you guys can see, we're pulling in data and calculating using the Powerbook configurations for everything except management agreement. Now that'll be the last one.  
Hit and that is kind of showing two of our stories this Sprint or I'm sorry in Sprint 28 that were completed. Did that kind of make sense the way I explained this? I'm not sure if if this structure is making sense to everybody.  
That seems video.  
Alright.  
Let's see. So we looked at the the statistics tab with three months of data and the copy paste kind of features. We looked at job group management and all the features of that.  
We have payroll forecasts where we're pulling in Legion data for both scheduled and actual, and then setting the forecasted payroll using either job groups or job codes depending on the configuration.  
And and then we've seen in the PNL here we're pulling in, we're pulling in the new ones we completed this for were billable accounts and per labour hour.  
So that is, that's all the features we did in Sprint 28.  
Any any questions for me before I kind of do a sneak peek on Sprint 29?  
So Sprint 29 has got some good stuff. We are actively working on these guys. So we're we're finishing out the management agreement calculations for Internal Revenue. I probably don't have to tell you guys are are pretty intense. So we've got 12345.  
Six stories here are all related to to implementing those calculations, and then the other three stories we're working on is pulling in the actuals data for the statistics tab and showing that on a daily basis.  
Of course, we're already pulling it into the P&L view on a monthly basis, but this is kind of for the day-by-day and then we're also adding the essentially. So there's a story here, job to site data from from Town Park EW. What's really the missing component for us?  
For us right now is the allocated salary costs and hourly rates. We're able to fetch almost all of that information already, but we had to get a new report developed by the HRS team and put in the EDW. So that's finishing off.  
Off that work is also in the Sprint, and then I'm also happy to say I think we're tracking a little ahead of schedule this Sprint so far. So I think we'll probably also be able to add in another story or two before the end of it.  
And that's that's what we're doing in the current Sprint. Any questions for me on that?

 **Sowells, Amy** 31:26  
No, I don't think so.

 **Esposito, Ryan** 31:27  
Yep.

 **Jonathan Aulson** 31:28  
You do. All right, guys. Well, that's everything I had for today. Thanks very much, everyone.

 **Sowells, Amy** 31:34  
Thanks so much.

 **Smith, Jeremy** 31:35  
Great. Nice work. Thank you.

 **Esposito, Ryan** 31:36  
Thanks.

 **Jonathan Aulson** 31:37  
Thanks.

 **Moore, Chris** 31:38  
Thanks, Tim.

 **Esposito, Ryan** 31:40  
I.

 **Jonathan Aulson** stopped transcription