**Backlog Grooming Forecasting-20250721\_181633-Meeting Recording**

July 21, 2025, 6:00PM

16m 22s

 **Jonathan Aulson** 0:26  
Hey, Jim.

 **Boyer, Jim** 0:27  
OK, uh, give me a second. I'll let the dog out real quick.

 **Jonathan Aulson** 0:47  
Hey, Michael.

 **Foy, Michael** 0:49  
Jonathan, how you doing?

 **Jonathan Aulson** 0:52  
Doing OK? How are you?

 **Foy, Michael** 0:55  
Doing doing well.

 **Jonathan Aulson** 1:05  
Baby.

 **Sowells, Amy** 1:07  
Hey, how's it going?

 **Jonathan Aulson** 1:11  
Doing OK. So wanted to review with you guys the presentation for the steering committee meeting tomorrow, just to run through it real quick, see if you guys had any thoughts for me before that call.  
Before we do that, I thought I could check in, Amy, on the job profile stuff. I think you said you were gonna work on it this week, but I just wanted to see where we're at with that.

 **Sowells, Amy** 1:36  
Um, I sent it back to you this morning.

 **Jonathan Aulson** 1:41  
Oh, nice.

 **Sowells, Amy** 1:42  
But I'm just wanna make sure I sent it to the right e-mail.

 **Jonathan Aulson** 1:46  
If, uh, yeah.

 **Sowells, Amy** 1:47  
Um, let's see. Yes, I sent it to. Let's see your Town Park e-mail.

 **Jonathan Aulson** 1:54  
Yeah, got it. OK. I see it there. Thank you.

 **Sowells, Amy** 1:56  
I did include Adam just so we could take a peek, but I don't think you need to like pause on moving forward because he doesn't get back till Monday.

 **Jonathan Aulson** 2:02  
OK.  
Got it. OK, we will start moving on that. The other homework I have for you guys is adding the 10 percenter sites. So we we will want to do that I think before pilot and configure them as closely as possible.  
Given the features we have, yeah.

 **Sowells, Amy** 2:27  
Yes, yeah, that's actually on my list starting tomorrow to do. I'm hoping to do most of them this month before before the end of the month.

 **Jonathan Aulson** 2:36  
Perfect. OK, that sounds good.

 **Sowells, Amy** 2:38  
Yeah.

 **Jonathan Aulson** 2:40  
All right. Well, that sounds like everything's going well. So on the presentation for tomorrow, I wanted to just run through this with you guys. The overall status I have is at green. We've completed several features since kind of the last call.  
And I have this Sprint and some from the next Sprint kind of listed here. There's actually more features than we have really room for to talk about here before pilot. But I and I'm not. Yeah, we'll have one more steering committee before pilot, OK.  
So on the milestone dates, we're on track for both of these. I did put an asterisk next to this guy because Amy is. I think you guys know the we've identified some user.  
Facing features that I think we're prioritizing up so.

 **Sowells, Amy** 3:39  
Actually, are you are you intending to share?

 **Jonathan Aulson** 3:42  
Oh gosh, my bad. Here we go. So we've completed these features and I've got these features kind of lined up for us. This is this Sprint to the next on the milestone dates. We've we're on track for both of the remaining milestones before pilot.

 **Sowells, Amy** 3:44  
All good.

 **Jonathan Aulson** 4:02  
The asterisk here just means we've prioritized some user-based features up and so these aren't all of the user features and I because that would be kind of misleading to say it's complete. I think here we also will complete all of the infrastructure and security because we've kind of gotten a head start on that.

 **Sowells, Amy** 4:22  
Yep.

 **Jonathan Aulson** 4:22  
So just wanted to kind of explain that a little bit.

 **Sowells, Amy** 4:25  
Yep, makes sense.

 **Jonathan Aulson** 4:27  
OK.  
On our risk and decision log, the three we have open right now, three risks, that is one decision. The risks are the data gateway that we know needs hardening and you know for scaling in.  
Production and all environments. So I've been talking to Guy on this. We've had a hard time connecting in a call, but he did let me know this morning he's going to be implementing that on Datamart servers.  
And I don't think those are in place yet. So I'm trying to get an ETA from him and I I scheduled a call with him today at 2:00 to see if if we can get that.

 **Boyer, Jim** 5:06  
No, you're not. You're not.

 **Sowells, Amy** 5:13  
OK, great.

 **Jonathan Aulson** 5:14  
This next one monitoring alerting. So we've we've met a few times on this with Guy. The current status is that there's there's things outs, you know there's things that power bill and forecasting rely on that.  
It aren't the set of things that Guy's team monitor. So things like Great Plains, kind of that specific app and the integration with Power Bill, at least the Great Plains side of it and things in Azure that are outside of a.  
Data control. So those kind of objects are what we're trying to get monitoring in place for. And so we've given them that list and we're hoping to get that in place. So I'll let you guys know if we are able to connect there.

 **Sowells, Amy** 6:10  
You know, I'm not quite, I don't understand. Is that more power bill because we use the Ledger? I mean, I guess it's forecast too because you pull account summary, but is it a concern about like account summary changes like if we add a GL code or something?

 **Boyer, Jim** 6:20  
OK.  
What's up?

 **Jonathan Aulson** 6:27  
Yeah, it will really it's it's about the health of the connection I think. So we have visibility into sending the data and we get we would get an error message if like the format was wrong or if the service was completely down.

 **Sowells, Amy** 6:34  
OK.

 **Jonathan Aulson** 6:45  
We would probably know that, but beyond that we can't really tell anything, you know, like if it if if a data map changes, yeah, yeah, just kind of health of it. So we're looking for that. We're looking for like a health metric on the ETL processes because that's something outside of the of our.

 **Sowells, Amy** 6:52  
Got it. If it stops refreshing or something.  
OK.

 **Jonathan Aulson** 7:04  
Our work on the platform and then there's certain things in Azure that we don't. Elena just doesn't have access to, so we would need some help to get those in place.

 **Sowells, Amy** 7:16  
Got it. OK.

 **Jonathan Aulson** 7:17  
Uh, monitoring on them, that is, yeah.

 **Sowells, Amy** 7:19  
OK. And is that are you, you're talking to Guy about that today as well?

 **Jonathan Aulson** 7:24  
Yeah, that's on the agenda if we can, if we can get a hold of him today.

 **Sowells, Amy** 7:27  
Connect. OK, just let me know if if something happens with that call and it gets pushed or something.

 **Jonathan Aulson** 7:29  
Yeah.  
OK.  
OK, let's see. Then this last one is kind of has to do with the ETL process. This is just making sure that the team that's going to build that out is available in the window we have planned for it.  
I think that we talked about this one on our last backlog grooming, so I know Juan Pascual is out this week, so I'm planning to confirm this when he gets back.

 **Sowells, Amy** 8:02  
Sounds good. Yeah. I mean, I think these are important to call out just in case we need to escalate them to Brian and Mike. Um, if if we don't see movement, right. So I think it's good. I.

 **Jonathan Aulson** 8:12  
Yeah, yeah, I go ahead. Sorry.

 **Sowells, Amy** 8:16  
No, no, no. I just one more. I had a potential risk listed and I just want to touch base and I don't know Jim, you might be the best person to speak to where we are with this, but it was it was about like the the access and like the role based access control for AMSDMS.  
And the job titles, like if the job titles were ever, I I guess it's two things. If the job titles were ever to change or like they added a new one, do we feel like there's a process where we would catch that so that a new position would still have access or we would catch it and be able to add them so they could have access and then?  
Two, I know there was that issue, Jim, with like DO OS potentially not having access as well. Has that been resolved? Is that still a risk we need to call out?

 **Jonathan Aulson** 8:59  
Definitely.  
So we have the job management panel that will call out a new job code that the system hasn't seen yet. It does need to be configured, but it will do that. And then the on the DOO question we have a list of all.  
I think all of all employees on the labor allocation report. And so we can use that list to know kind of all users of the system. So yeah, we we do have both of those things.

 **Sowells, Amy** 9:36  
OK.  
Awesome. And the the assigning like the new job codes I I do, I understand. I know we saw that interface but we'll we will like add their job group and all that. But if it's that to me is more so to ensure that the job codes are pulling to the payroll tab.

 **Jonathan Aulson** 9:43  
Yeah.

 **Sowells, Amy** 10:02  
Correctly, but would that also allow us to ensure they have the right access? Like if it is a new salaried position that needs access to the forecast system?

 **Jonathan Aulson** 10:15  
You know the the way we have the roles set up, they would the job title is gonna need to be the same and you guys can set the job title. So I would say you know if if a new job code shows up that really is supposed to be a district manager, then you know that's the title to give them.

 **Sowells, Amy** 10:15  
You know.  
OK.  
Got it. And we would, we would code that in the system and that's what would allow them access. OK, got it. OK, that makes sense.

 **Jonathan Aulson** 10:37  
Yes, yeah, yeah.  
Cool. Um.

 **Sowells, Amy** 10:47  
Jim, did you have something to add or no?

 **Boyer, Jim** 10:51  
That's gonna be though. We'll make sure we worked on the, you know, they understand the DOO role right now because I heard John bring that up is like they're gonna have access to every site in districts. Just make sure you know that and you're comfortable with that.

 **Sowells, Amy** 10:53  
OK.  
Is that how they're approaching it in like the claim system too?

 **Boyer, Jim** 11:13  
I have no the system. I think that actually is like an open issue, but it was a it was a reporting. It was a workaround we did for reporting because they were all losing their mind that they couldn't see certain sites.

 **Sowells, Amy** 11:18  
OK, got it.  
OK. Well, I mean, as a company, if they're OK with that from a reporting perspective, then from a forecast perspective, that should be OK.  
OK. Thank you. You can keep going.

 **Jonathan Aulson** 11:41  
Uh, let's see.  
Oh yeah, I think we oh, the the decision. So this is kind of an open decision we raised on the last steering committee. We've prioritized certain features to begin.  
Again development during pilot and I think we want to review that road map. So I've got the road map. I don't have like I'm I'm thinking I might create a slide that makes that presents this a little differently but.  
It's essentially this information that we've completed this, we have this guy in progress and we'll complete these and then this is the set that's going to happen in pilot or later.

 **Sowells, Amy** 12:26  
Got it? Yep.

 **Jonathan Aulson** 12:27  
Yeah. And then I'll probably add in to that graphic the the ones that kind of took the place of these, just so it's clear what happened there, if that makes sense.

 **Sowells, Amy** 12:39  
Makes sense. Yep, it does.

 **Jonathan Aulson** 12:42  
Well, that is.

 **Boyer, Jim** 12:43  
Is that just a feature list, John, or is that all work?

 **Jonathan Aulson** 12:46  
Is is that what was the last thing? Is that?

 **Boyer, Jim** 12:49  
Well, is that just a list of features or is it all inclusive? I'm just looking at it real quick. So 'cause I don't, I don't see your, I don't see your Dataverse table for internal revenue.

 **Jonathan Aulson** 12:54  
It's this is.  
Correct. Yeah, this is, this is the feature list and then the the delta between this and all the work is that set that I'm going to add into kind of the graphic to make it clear the other user stories that that we've prioritized kind of over these.

 **Boyer, Jim** 13:18  
Yeah.

 **Jonathan Aulson** 13:20  
Yeah.  
Let's see. So that's that the project plan and change management plan, the roughly the same as last time we do have kind of changing the way I talk about the rollout instead of when it finishes, I'm talking about when it when it starts or I'm sorry, vice versa.  
Instead of when it starts, I'm I'm talking about when it finishes because that's kind of how the change management plan looks at it. And then for the for the feature work, we're on track to complete what's in the list.  
So that's that's all of the steering committee meeting. Is that everything work for you guys? Any any thoughts for me on the risk log or decision, anything like that?

 **Boyer, Jim** 14:05  
Yes.

 **Sowells, Amy** 14:13  
No, I don't think so. Mike, what thoughts?

 **Jonathan Aulson** 14:15  
OK.

 **Foy, Michael** 14:15  
I I I would just say just let us know how it goes this afternoon during that meeting because if that doesn't happen then I I just, I just think we, Amy, you and I should probably just get ahead of that and have a conversation with Mike before the call tomorrow.

 **Sowells, Amy** 14:30  
Agreed. Yep, agreed. So yeah, just keep us posted, Jonathan.

 **Jonathan Aulson** 14:32  
Yeah.  
OK, yeah, I'll shoot you a note at around 3:30. OK, let's see. So that and then we touched base on job. OK, I think that's everything I had for the call.

 **Sowells, Amy** 14:41  
That's good.

 **Boyer, Jim** 14:49  
The.

 **Jonathan Aulson** 14:51  
Jim, did you have something?

 **Boyer, Jim** 14:53  
No, did. Well, I guess since you asked though, did my e-mail back to you the other day make sense about the hourly positions and the allocations?

 **Jonathan Aulson** 15:00  
Well you know I was I I I kind of had I was in in my head I was talking to Jim Lachowski but I I I get I get your point the I think my my the piece I still don't really understand honestly is.

 **Boyer, Jim** 15:06  
Uh oh.

 **Jonathan Aulson** 15:16  
How an hourly employee, like why an hourly employee would have allocated cost. That just didn't make sense to me. It seems like they're wherever they clock their hours, that's that's where they're allocated. So I'm that part I'm not sure, yeah.

 **Boyer, Jim** 15:25  
Right. That was, that was my point. Yeah, yeah, that I that's. I mean, unless somebody tells me otherwise, I would think that would be the only way their time would be attributed between multiple locations.

 **Jonathan Aulson** 15:35  
Yeah, yeah. So I'm. I'm unclear why they why they do it that way, but I I don't have to know. I just. I'm curious. OK, let's see. Well, sounds like that's it.  
We do have a couple more backlog sessions this week, and I planned for those to kind of look at the stories we're starting during pilot and then review the ones that are gonna be in next Sprint.  
So that's kind of the plan there.  
All right, guys. Unless you guys have anything, I think we're good.

 **Boyer, Jim** 16:14  
Yes.

 **Sowells, Amy** 16:15  
No, I don't think so. Thanks so much.

 **Jonathan Aulson** 16:17  
Thank you. Bye-bye.

 **Boyer, Jim** 16:17  
Hi.

 **Sowells, Amy** 16:18  
Alright, see you guys.

 **Foy, Michael** 16:18  
Thank you. See ya.

 **Jonathan Aulson** stopped transcription