**Backlog Grooming Forecasting-20250724\_184439-Meeting Recording**

July 24, 2025, 6:00PM

43m 53s

 **Jonathan Aulson** 0:08  
Hey, Susan.

 **Cesar Figueroa** 0:11  
Hello.

 **Jonathan Aulson** 0:29  
Hey, Amy.

 **Sowells, Amy** 0:30  
Hey guys, how's IT going?

 **Jonathan Aulson** 0:32  
It's going good.

 **Sowells, Amy** 0:34  
Good.

 **Jonathan Aulson** 0:36  
Yeah, um.  
Yeah, so let's see. I haven't checked e-mail in a couple hours. I do we have the job profile to look at?

 **Sowells, Amy** 0:48  
Yes, I did send it. Um.

 **Jonathan Aulson** 0:50  
Okay.

 **Sowells, Amy** 0:53  
It's not perfect, but.  
Yeah, like most sites were very well, yeah, some sites were very straightforward. Others, and I made my notes on the mapping sheet I sent to you, but there was just some like odd situations. So I don't know if you want me to like open IT up and we can go through each one.  
Want to talk through them or if you'd rather review IT first and then let me know. Oh, here you go. OK.

 **Jonathan Aulson** 1:21  
Yeah, it looks maybe we, um, OK, so the tabs along the bottom, these are the, uh, pilot sites, right?

 **Sowells, Amy** 1:29  
Correct, yes.

 **Jonathan Aulson** 1:30  
OK and OK.

 **Sowells, Amy** 1:33  
And then, yeah, in column A, that's that's what the budget includes. And then the mapping I added in column B. So like this one was very straightforward. Each budget position had like an obvious job code that's being used today.

 **Jonathan Aulson** 1:42  
OK.  
Yeah, yeah. OK. Yeah.

 **Sowells, Amy** 1:53  
Right to align IT to but like OK the next one that's not that weird. I actually suggested they use one of the newer like a newer location as a pilot site because then we can test first just like a newer AM that's starting with the company but also.  
Test the process for for a new site forecast and like how that perform a data gets into the system. There's no data pull. There was no data pulling in the file for the budgeted job codes. That might just be timing, but we if like.

 **Jonathan Aulson** 2:20  
Got it.

 **Sowells, Amy** 2:31  
I don't know. I'm guessing the proforma data isn't in the budget database for this one. So I think it's a Good test case with something we'd probably want to talk to Adam about because I think he's kind of responsible for loading the final proforma data into the budget database, I believe.

 **Jonathan Aulson** 2:37  
Right.  
Okay.  
OK, that makes sense.

 **Sowells, Amy** 2:49  
Which is what? Yeah, which is what would be the starting point of the forecast 249. That was straightforward.

 **Jonathan Aulson** 2:54  
OK.

 **Sowells, Amy** 2:59  
Nine. OK, so this example, so they had these GSA positions budgeted. I'm assuming unless, unless you're I didn't take a look at whether there's actually out where hours, but actually let me take a look at that budget to see if there's.  
Actually hours budgeted or if that just pulls regardless.

 **Jonathan Aulson** 3:31  
I can connect to the database for we're looking at that so we can some live queries here.

 **Sowells, Amy** 3:37  
Yeah, I can pull this up pretty quick here.  
OK, yes, so this one actually had no GSA hours budgeted. So I wonder if for some of these the budget hours are actually zero and we can disregard them.

 **Jonathan Aulson** 3:46  
Yeah.  
OK.  
Yeah.

 **Sowells, Amy** 3:54  
The only position budgeted or the only hours that were budgeted are Screener, which aligns with what we're actually working.  
So not sure. I wonder if there's four poll regardless of.  
What are those hours budgeted?

 **Jonathan Aulson** 4:12  
Yeah, we should probably add some logic in that if, well, I guess let me ask it if there's no budget.  
But we find active employees in the job. What should we do?

 **Sowells, Amy** 4:30  
I guess just have zero as the budget.

 **Jonathan Aulson** 4:34  
OK.

 **Sowells, Amy** 4:34  
I don't know what else we do, you know, like it's.

 **Jonathan Aulson** 4:37  
Yeah.

 **Sowells, Amy** 4:38  
In this case, it's fine 'cause there's no GSA budgeted. But yeah, in in the case where there was, there were hours budgeted and enroll and no hours actualized or the reverse, right, there's.

 **Jonathan Aulson** 4:43  
OK.  
I suppose either way we should think about. Yeah, yeah, yeah, it makes sense. So if there's no budget, like if if the if the job profile's listed but with 0 hours budgeted, then.

 **Sowells, Amy** 4:55  
Yeah.

 **Jonathan Aulson** 5:07  
We'll we'll we'll use zero as the budget number. I think that'll flow now and Chris and Cesar, maybe you guys can jump in here if if we find a job code associated to the site in the work day data.

 **Sowells, Amy** 5:09  
Right.

 **Jonathan Aulson** 5:26  
But we don't. But the but the job profile that's been, you know, there there's even even with our new mappings, the job profile doesn't exist in budget. What's the UI gonna do? What? What should we expect there?  
K.

 **Cesar Figueroa** 5:50  
So that's what we need to define, right? I I think that we suggest for example a split the amount between the the job codes that are available or something like that.

 **Jonathan Aulson** 6:08  
Well, I think our goal here is to automate. I guess my my thinking is if if there's a a job that's active, but we don't have a job profile.  
With budget associated Uh.  
I think, I mean, I think their choices are either we show the budget as zero or we we don't show a budget line at all. I feel like 0 showing it as zero makes more sense. Amy, what do you think?

 **Sowells, Amy** 6:42  
Yeah, I think that's fine.

 **Jonathan Aulson** 6:45  
OK.

 **Christopher Thompson** 6:47  
Yeah. So just sorry, I'm kind of multitasking, so I I missed part of that question. So, so you're basically saying if we have a job code on the site and we don't find anything that maps or any job profiles that map to that job code, what do we do with it? Was that the question?

 **Jonathan Aulson** 6:47  
OK.  
Sure.  
Yeah, I think I'm just wanting to make sure it makes sense to all of us to show a zero budget. So if we, in other words, if we find the budget as zero or if we don't find a budget, in either case we'll show 0.

 **Christopher Thompson** 7:11  
Right.  
Right, so that's what we do now. So for example on site 0170, like the shuttle 2, right? Because shuttle maps to job or shuttle maps to shuttle one, not shuttle 2.

 **Jonathan Aulson** 7:20  
Yeah, OK.  
Yeah.

 **Christopher Thompson** 7:34  
So shuttle two just shows zero right now. The only exception to that is salaried because we don't expect to find those in the scheduled budget, so we just throw 8 hours on every day.

 **Jonathan Aulson** 7:37  
Zero. Yeah. OK.  
Uh, right. Yeah.

 **Christopher Thompson** 7:51  
Per active employee.

 **Jonathan Aulson** 7:53  
Times the daily rate. Yeah, OK, makes sense. Did did you, Amy, did that all make sense to you?

 **Sowells, Amy** 7:59  
Yes, Yep.

 **Jonathan Aulson** 8:00  
OK, cool. All right, so got that one.

 **Sowells, Amy** 8:08  
OK. This one, Yeah. OK. So this is one of those situations. So this is 1 where there's an additional position being worked called traffic, but there's no, yeah, no indication that that was budgeted. So that would just have a zero budget.

 **Jonathan Aulson** 8:09  
Aye. Yeah.  
OK, OK, OK.

 **Sowells, Amy** 8:26  
I mean, it's poss. It's just it's kind of impossible really to to understand.  
How these relate to the budget 100% because traffic was probably worked in prior years, which means they probably did budget IT somewhere, but there's no way to know where, right? So and I mean we should.

 **Jonathan Aulson** 8:35  
Yeah, yeah.  
Um.

 **Sowells, Amy** 8:50  
We should have these conversations with Adam too, but just so we can push forward and get the pilot onboarded. Yeah, in this situation, yeah, that budget would just show zero. OK, 11/29 that was.

 **Jonathan Aulson** 8:54  
Yeah.  
OK.

 **Sowells, Amy** 9:06  
That was straightforward. There was two. Is that, is that an issue that there's two? There's only one budget for shuttle hours, but there's two positions relating to shuttle.

 **Jonathan Aulson** 9:08  
Uh, well, this one.  
So this is where it does get tricky. Um.  
And Chris, I'm going to need you on this one, Sir. We're looking at an example of a single job profile that's mapping to multiple codes within the same site. And so I think here it gets tricky for us, right? Because we need to know should.  
We consider like the number of active employees, you know, yeah.

 **Sowells, Amy** 9:48  
Well, what about what about the job? Like I know for per labour hours IT would be problematic, but for non per labour hours aren't we just showing job group?  
Right.

 **Jonathan Aulson** 10:05  
To the groove. Yeah, yeah.

 **Christopher Thompson** 10:07  
They just they would have to be in the same job group. So if they ever got split out that could be problematic but.

 **Jonathan Aulson** 10:10  
Yeah, which they are for these, yeah.

 **Sowells, Amy** 10:11  
Yeah, and they definitely would be.

 **Jonathan Aulson** 10:13  
I.  
Yeah.

 **Christopher Thompson** 10:16  
Um.

 **Sowells, Amy** 10:17  
It's not going to be perfect and I think that's what I want to talk through with Adam is like.  
There's no way we can get this to be perfect, so is it better to?  
Have some sort of different approach it. I don't even know if there is a different approach or because we have to have a starting point right which so I don't know how what the different approach is. But yeah that's that's what I want to kind of talk through with Adam next week when he's back.

 **Jonathan Aulson** 10:35  
Right.  
OK, you know.

 **Christopher Thompson** 10:45  
Yeah. And and I think, oh, sorry, go ahead.

 **Jonathan Aulson** 10:49  
Go, go ahead, Chris.

 **Christopher Thompson** 10:51  
Oh, I was gonna say I I I think my thought to the approach on like line 9, right, would be that if we had multiple job codes, we would split those hours.  
And try to weight them by the active employee count, right. So if there's like 5 shuttle two and only one shuttle supervisor, right, then we would obviously put more more hours against the shuttle two, but.

 **Sowells, Amy** 11:18  
Yeah, yeah.  
Yeah.

 **Christopher Thompson** 11:24  
Um.

 **Jonathan Aulson** 11:26  
Yep.

 **Christopher Thompson** 11:27  
Yeah, and I I'd have to look. I I don't know. I mean, ideally I would like to code IT so that IT doesn't matter if they're in the same job group or not, just because if for some reason.  
Something weird happens and something gets split between two different job groups, then IT should still handle IT the same way.

 **Jonathan Aulson** 11:50  
Well, when you say that, so I was about to open that topic, right, 'cause we need.  
We need to account for the possibility that that this happens and they're not in the same job group. So you're saying that we could somehow handle that in the code?

 **Christopher Thompson** 12:05  
We should be able to because I mean the way we assign the job codes to the site is just we we directly assign the job code to the the site, right? Not the job group that they're in.

 **Jonathan Aulson** 12:12  
Yeah.  
Right.

 **Christopher Thompson** 12:20  
So we we should in theory be able to just, you know, find any job codes assigned to that that are in, you know, the list of actual job codes.

 **Jonathan Aulson** 12:21  
Huh. Yeah, I see your point. OK.  
OK.

 **Christopher Thompson** 12:35  
So I I think that's doable. And then the job groups, yeah, the job groups should basically just some whatever job codes are in that group.

 **Sowells, Amy** 12:37  
Hmm. OK.

 **Jonathan Aulson** 12:39  
Way to go past US for designing IT that way, yeah.

 **Sowells, Amy** 12:43  
Yeah.

 **Jonathan Aulson** 12:47  
Yeah. OK. That makes sense. Nice.

 **Sowells, Amy** 12:52  
Awesome.

 **Jonathan Aulson** 12:52  
OK, moving on. So this one looks pretty straightforward.

 **Sowells, Amy** 12:58  
That one was straightforward. Yeah. Now I took some liberties there. I mean, like.  
Yeah, lot attendant. Yeah, lot attendant.

 **Jonathan Aulson** 13:06  
Oh, now this is kind of interesting. So this, this position is, yeah, they're gonna get all the budget for these guys, huh?

 **Sowells, Amy** 13:13  
I guess like I don't.  
I don't know why they budgeted for these random positions when they're not actually being worked. So I I don't know if it's better to leave those blank, but I guess the budget has to go somewhere, right? So yeah, yeah, OK, OK.

 **Jonathan Aulson** 13:27  
Yeah, I think that makes sense. Yeah.  
OK.

 **Sowells, Amy** 13:35  
Um, actually, if you go back to that last one, I I wonder.  
Like there was no team leader. Yeah, I guess that makes sense. Yeah. So greeter.  
I wonder if it's better.  
Let me think about this.  
Like if I put the lead greeter to.  
Added that to cell B5.  
So that.  
Wait, would that? No, that wouldn't make sense, 'cause they're gonna be separated.  
I'm just thinking.  
I'm wondering if the the greeter and the lead greeter too were budgeted both as greeter.  
Um.  
I guess just leave it like this for now and we can review how it shakes out.

 **Jonathan Aulson** 14:40  
Yeah, yeah, I think, I think that'll, it'll Help a lot once we can see these in the site. Yeah, OK.

 **Sowells, Amy** 14:40  
This one. This one actually is a little weird.  
Yeah, yeah.  
OK, yeah, 1582. There was a GSC budgeted, but it doesn't. That's not being used anymore, so actuals are gonna be 0 for that one.

 **Jonathan Aulson** 15:00  
OK.

 **Sowells, Amy** 15:01  
So is it better to just put GSA in that cell so that GSA gets the full budget?

 **Jonathan Aulson** 15:07  
I think that makes sense to me.

 **Sowells, Amy** 15:09  
Yeah, let's do that.

 **Jonathan Aulson** 15:10  
OK.  
OK.

 **Sowells, Amy** 15:17  
All right. And then this one was straight forward. Yeah, this one was very simple.  
Um, this one. Same thing.  
Here, yeah, I wanted to look this one up. I think this one is similar to 0919 where it's pulling, but it's not actually. It wasn't actually budgeted at all because this is a.

 **Jonathan Aulson** 15:39  
Uh.  
Yeah.

 **Sowells, Amy** 15:43  
This is strictly a bell site, so I doubt we have any GSA budgeted.  
But let me confirm that real quick.

 **Jonathan Aulson** 15:50  
OK.

 **Sowells, Amy** 15:52  
Yeah, no GSA is budgeted, so that should be a non issue. OK. And then this one, this one was.

 **Jonathan Aulson** 15:55  
OK.  
Yeah.

 **Sowells, Amy** 16:04  
Yeah, this one. OK, this was the only one that had like multiple GSA. They had a they had GSA and then they had GSA 2-3 and four. So um.

 **Jonathan Aulson** 16:11  
OK.

 **Sowells, Amy** 16:14  
I just lumed it all into GSA.

 **Jonathan Aulson** 16:17  
Yep, that makes sense. Yeah. So yeah, the GSA budget will go towards all four codes, and then the budget here will all go into GSA.

 **Sowells, Amy** 16:19  
OK.  
Yes, I.  
Right, 'cause they're all part of the same group, so I think that should be fine.

 **Jonathan Aulson** 16:36  
Yeah.  
Yeah, OK, well.

 **Sowells, Amy** 16:41  
240 was very straightforward. This one, yeah, this one was also this one. Although they have bell and cashier broken out or no, they did have a cash position being used, but they had bell budgeted but no bell being worked. They had a ton of GSA hours, so I think.

 **Jonathan Aulson** 16:56  
Yeah.

 **Sowells, Amy** 17:04  
There's there's like the GSA are probably filling the development role.

 **Jonathan Aulson** 17:09  
Yeah, OK.

 **Sowells, Amy** 17:12  
So I guess that's gonna be a little weird from a job group perspective, but.

 **Jonathan Aulson** 17:19  
Well, is this they would be, they would both be in the valet group, right?

 **Sowells, Amy** 17:19  
Or no, it wouldn't. It wouldn't 'cause.  
Yeah. And the budget will just show there. So yeah, I think that's fine.

 **Jonathan Aulson** 17:28  
OK, OK.

 **Sowells, Amy** 17:32  
Um, this one.  
Yeah, this one was fine. Nothing weird.  
OK, this one was funky like they had.  
Yeah, they really only have these.  
Visitor management concierge positions.

 **Jonathan Aulson** 17:53  
OK.

 **Sowells, Amy** 17:54  
And then a site administrator, not they don't have GSA, which I think is probably just pulling because like the other ones where there wasn't actually anything budgeted, but greeter is not being used and team leader is not being used, so.

 **Jonathan Aulson** 18:03  
OK.  
Mm.

 **Sowells, Amy** 18:10  
I guess so.  
This should work out though, because all those visitor managers roll up to the same job group.

 **Jonathan Aulson** 18:19  
Yeah.

 **Sowells, Amy** 18:20  
And then basically all the budget is gonna show there. This is a pro labor hour, but this will be a good test case to see how it looks.

 **Jonathan Aulson** 18:22  
Now.  
OK, yeah, I I I have a gut instinct here that as opposed to like not mapping them, I think I have a preference to map them to something, even if there's zero amounts, you know?

 **Sowells, Amy** 18:42  
Yeah, you mean if if there was a budget, if there was a budget, it should match, it should map to something.

 **Jonathan Aulson** 18:43  
Would that be OK? Yeah.  
Yeah, yeah. So, so like, I I think what I heard you say is that these job profiles don't actually have any budgeted money on them, but because because they are associated, they're coming up on our query for the site, I'd rather map them into a.  
Job code and just know that it's gonna be a zero ad, you know, just to have a mapped.

 **Sowells, Amy** 19:14  
I don't like the greeter. The greeter is going to be that situation because there actually are greeter hours budgeted, but there's definitely no GSA. So I think, I think those four GSA positions are coming up regardless of whether they have them in this.

 **Jonathan Aulson** 19:18  
Mhm.

 **Sowells, Amy** 19:34  
In that pivot.

 **Jonathan Aulson** 19:37  
Uh, let's look at the budget table and let's just. I just wanna make sure I'm following along here. Um.

 **Sowells, Amy** 19:37  
Because.  
OK.

 **Jonathan Aulson** 19:50  
OK, so we'll do.

 **Sowells, Amy** 19:54  
And yeah, maybe that was a problem with how I did that pivot, but.

 **Jonathan Aulson** 19:59  
This is site 2228.  
Oh.  
Oh.  
OK, so yeah, GSA's are coming up to zero. So, so that makes sense. And we have team leader, although team leader's got a lot of hours on it.

 **Sowells, Amy** 20:33  
Yes, Team Leader was in the budget, but it's not.  
Not being used.

 **Jonathan Aulson** 20:40  
So, like, philosophically, do we want to give them that budget or do we want to? OK.

 **Sowells, Amy** 20:44  
Yeah, yeah, I think you're right. It needs to go somewhere. So I would put it with the Um.

 **Jonathan Aulson** 20:53  
Maybe the lead guy here?

 **Sowells, Amy** 20:53  
The Yeah, Yep, let's do that. Actually, yeah, that makes more sense. Let's do that.

 **Jonathan Aulson** 21:04  
K and then is it? How do we feel about just mapping this basic job down for these?  
Good.  
You know what I mean?

 **Sowells, Amy** 21:20  
What? What's that? Well, GSA is not.

 **Jonathan Aulson** 21:21  
Well, doing this is is what I'm proposing. Even though it's a zero amount, I'd rather have these mapped just in just as kind of a an approach, right. So that if something for whatever reason, like if if later down the road we have a process for pro formas where we're pulling in.  
We're adding to budget final or something. I I just, I'd like to have everything mapped if we can. I don't know. Are you, is there any issue you see with doing that?

 **Sowells, Amy** 21:50  
No issue as long as like it doesn't show up on the payroll build anywhere showing like a GSA budget.

 **Jonathan Aulson** 21:57  
Now it would come in under this job code.  
So GSA wouldn't.

 **Sowells, Amy** 22:02  
So it's really gonna not be, it's not gonna be impactful from like a like a forward-facing perspective, right? Because there's nothing budgeted there. OK, then that's, yeah, that's fine.

 **Jonathan Aulson** 22:09  
Right, Yeah.  
Yeah, zero impact. Yep, Yep. OK, so this looks great. It looks like we have the set for pilot. I I need to raise a concern with you, Amy, and and this is kind of one of those.  
Tough ones that but I I wouldn't be doing my job if we didn't talk about it. I I'm seriously concerned about our ability to to complete all sites by by the time we go live. Are you confident that we're we're on track for that or?

 **Sowells, Amy** 22:44  
When it comes to this.

 **Jonathan Aulson** 22:44  
How do you, how do you feel? Yeah, this activity.

 **Sowells, Amy** 22:48  
Um.  
I don't know. It's tricky. I think. I think we need to level set with Adam next week and come up with the best approach. And then depending on what that approach is, I need to think about the level of effort to support that because yeah, if if it's like this, which is very.

 **Jonathan Aulson** 22:58  
Yeah.  
Yeah.

 **Sowells, Amy** 23:13  
Manual.

 **Jonathan Aulson** 23:14  
Yeah.

 **Sowells, Amy** 23:15  
It's gonna take a team and it's still gonna take time, so um.

 **Jonathan Aulson** 23:18  
Yeah.  
Yeah.

 **Sowells, Amy** 23:23  
So, yeah, but I don't know that until we really sit down with Adam and we think through the best approach because maybe he'll say, oh, you know, we shouldn't do it this way, we should do it. Just ignore budget. And but again, I don't know how that's possible because I guess my thing there is, OK, if we just throw budget out the window and we're like, we're not going to show.

 **Jonathan Aulson** 23:35  
Fair enough. Yep. Right. Yeah.

 **Sowells, Amy** 23:43  
No budget at all. We're still left with the fact that there's no starting point right for forecast.

 **Jonathan Aulson** 23:43  
Yeah.  
Oh, yeah. No, I mean, that would be a that that would, that would have huge repercussions. I mean, we've built the whole system on the concept of starting with budget. So I mean, we'd have to really sit down and think about what that meant, I think, yeah.

 **Sowells, Amy** 24:00  
Right, right.  
Right. So, so yeah, let let's talk to Adam. Maybe it's more simple than I'm.

 **Jonathan Aulson** 24:10  
Yeah.

 **Sowells, Amy** 24:13  
Than I'm thinking, but let's do that. And then, I mean, yeah, if if it's just a matter of the fact that it's very manual and we have to put a team together to do this, then that's what we're gonna have to do.

 **Jonathan Aulson** 24:23  
OK.

 **Sowells, Amy** 24:24  
I mean, it's definitely no worse than the billing system, building all those sites out manually, you know, I mean, we did that. So I mean, I mean, I did just this week, I built out like 100 plus sites on Power Bill. So yeah, if it is a manual process, then we're just gonna have to get it done.

 **Jonathan Aulson** 24:25  
Sure.  
Yeah, yeah, true.  
Amazing.

 **Sowells, Amy** 24:44  
By the timeline.

 **Jonathan Aulson** 24:45  
Yeah.  
Well, I I admire that spirit. We'll we'll get there then. OK, so this looks great. We will get these updated. Let me just roll through again real quick and make sure. OK, so this one we just we're not going to have budget for this guy and that's OK.  
This one's mapped this one, so let's talk about this one again. Uh, they don't have any GSA job codes is what I understand here, right?  
Is is the only job at this site? Is this the only job code?

 **Sowells, Amy** 25:18  
That's right.  
Correct. Yeah, that's the only one budgeted and the only one used.

 **Jonathan Aulson** 25:27  
Interesting. OK, well, if if it's OK with you, I'm gonna go ahead and map all of them to Screener and that way, just in case, whatever, you know, they they get the whole budget.

 **Sowells, Amy** 25:27  
Very, very simple.

 **Jonathan Aulson** 25:40  
And OK.

 **Sowells, Amy** 25:43  
Yeah, but that one 919, just to be clear, there's no hours budgeted for GSA.

 **Jonathan Aulson** 25:44  
Shut me up.  
That makes sense. Totally. Totally makes sense. Yeah, yeah.

 **Sowells, Amy** 25:50  
OK, OK.

 **Jonathan Aulson** 25:53  
Uh, OK.  
Now was there? Did you go through any kind of process to make sure all all the job codes at the site were represented?

 **Sowells, Amy** 26:22  
Yes, but I I will say I just looked at June hours. So like if they add anything in July or they start using something they haven't been using cause there are there are sites that have active job codes but they just aren't using them.

 **Jonathan Aulson** 26:24  
OK.  
OK.  
Yeah.

 **Sowells, Amy** 26:41  
So I didn't consider those situations, but yeah, I looked at I I included on here all of the job codes that were being used in the month of June, so it should capture everything.

 **Jonathan Aulson** 26:46  
Yeah.  
Yeah.  
Wonderful.

 **Sowells, Amy** 26:56  
Yeah, I'm curious what we what we get when and I don't even know if this is gonna show, but like if if it's gonna show any job codes that need to be assigned.

 **Jonathan Aulson** 26:57  
Um.  
Uh, yeah.

 **Sowells, Amy** 27:09  
In addition to these in that little app.

 **Jonathan Aulson** 27:12  
Yeah.  
OK.  
Oops.  
OK, well this looks great. We'll get this put into the system and that'll give us a nice or a starting point anyways to to understand what this is all going to look like.

 **Sowells, Amy** 27:41  
Yeah, OK.

 **Jonathan Aulson** 27:42  
And OK, so other than that, I'm working on some stories for the next Sprint. Oh, in fact, this one I had on screen. I wanted to review with you. It occurred to me that in other expenses tab we are.  
This tab's going to work a little differently per our kind of recent conversations. We want to just show whole dollars here. And so because of that, I suspect we're going to have like examples where the actual value matches the forecast exactly.  
And so I thought it might be worth having a different symbol on the variance to show an exact match. You follow me.

 **Sowells, Amy** 28:28  
Mm mhm. Yep.

 **Jonathan Aulson** 28:30  
So I'm proposing this one is just like a little circle dot, kind of like on target, right? What? Any thoughts there?

 **Sowells, Amy** 28:36  
Yeah.  
Yeah, I think that's fine.

 **Jonathan Aulson** 28:41  
OK.  
I'll add that in to. We've already done site parking stats. If we have time, we'll go back and add this in. But on each story moving forward anyways, I'll include this as a requirement so that we we try to stay consistent as we can. But as I mentioned, we already did.

 **Sowells, Amy** 29:02  
OK.

 **Jonathan Aulson** 29:03  
Parking stats. So we'll have to. We'll have to remember to go back and revisit that at some point. I suspect, though, that's gonna be more rare to have an exact match there, but we'll see, yeah.

 **Sowells, Amy** 29:10  
Exactly, exactly. I'm thinking the same thing.

 **Jonathan Aulson** 29:14  
OK, OK, so that's that's that one. So want to get your input on priority. I've got the number one priority for us is.  
Right now, forecasted parking rates don't actually change the forecasted external revenue on the parking stats tab. So that we're tying those two things together. This has been kind of a loose end for us for a while that we're just kind of we're finally getting.

 **Sowells, Amy** 29:49  
Uhuh.

 **Jonathan Aulson** 29:49  
The time to kind of close it. So that's the top priority in my mind. And then I have our set of stories that address all those changes in the UI that we got together on like.

 **Sowells, Amy** 30:05  
Yep.

 **Jonathan Aulson** 30:06  
You know, for for the PNL, getting all the red and greens, the variance view is the default. Actually parking stats. I think this one I don't need anymore, so I'll remove that. But OK, so that's kind of that set of stories.

 **Sowells, Amy** 30:12  
Yeah, I think that makes sense.

 **Jonathan Aulson** 30:19  
Stories.  
Then we kind of have a choice. In my mind, the next priority after this is probably getting getting to work on our 12 month calculated forecast, but.  
We could, we could instead prioritize. Well, so let me let me back up a second. This is gonna take us through mid August maybe.  
Well, yeah, through through mid August. So the pilot doesn't start until September 2nd. So there's one Sprint where we might try to get some more user facing features in or we might say you know what this this this calculated forecast.  
Work. There's a lot of it and and maybe we want to get started early so that we're certain it's done by go live. That's kind of the direction I'm leaning. OK, so the trade off here.

 **Sowells, Amy** 31:20  
Yes, I agree with that.

 **Jonathan Aulson** 31:25  
Is between taking that, which is I look at that as kind of a a less a more a more risk averse approach, right? There's a trade off though the summary cards which I know are high value, those items would would come after and so that probably means after go live.

 **Sowells, Amy** 31:46  
Or yeah, after pilot, right?

 **Jonathan Aulson** 31:48  
After pilot, sorry, yeah. So it'd kind of be rolling out around go live maybe after sometime in that time frame.

 **Sowells, Amy** 31:50  
Um.  
Oh yeah, yeah, I don't disagree.  
We'll just have to.

 **Jonathan Aulson** 32:04  
So you're thinking, you're thinking calculated forecast first?

 **Sowells, Amy** 32:07  
Yes.

 **Jonathan Aulson** 32:08  
OK.

 **Sowells, Amy** 32:09  
Yeah, 'cause I don't want, like you said, to wait two weeks and then realize there's a problem and not have enough time to fix it.

 **Jonathan Aulson** 32:15  
Yeah, that's what I'm thinking too. OK.

 **Sowells, Amy** 32:18  
So yeah, we can just explain, um, when we're introducing the system to the pilot group.  
You know those features are coming, but they're not live yet.

 **Jonathan Aulson** 32:30  
Yeah, Yep.  
Yeah. OK. Good deal. Very good. So then the only other thing I wanted to call out is we have this set of comparison of prior year which has kind of fallen in in.

 **Sowells, Amy** 32:36  
Makes sense to me.

 **Jonathan Aulson** 32:49  
Well, it's been, it's been replaced in priority, right. So it's kind of it's down here sometime after some the the summary cards there, you know there is kind of the workaround where they can set the year to the previous year and see the values.  
I know that's not ideal, but I just wanted to like call it out in my mind. That's why this it does belong here. I think it's OK to to to do this a little later, OK.

 **Sowells, Amy** 33:17  
Yeah, yeah. I don't know what other option we have 'cause it it will be live. It'll be there for go live, just not for pilot, right?

 **Jonathan Aulson** 33:26  
The prior year comparison I I can't. I couldn't guarantee that.

 **Sowells, Amy** 33:29  
Yeah.  
OK.

 **Jonathan Aulson** 33:33  
We're gonna try, but it really depends on how this calculated forecast goes right now. I think we're trying to get our arms around how much work it is. I mean, we we understand it and in fact we've in fact Cesar here is has kind of taken it upon himself to get started on it. So we've got some.

 **Sowells, Amy** 33:52  
OK.

 **Jonathan Aulson** 33:53  
Progress already, but it's we're unsure. I mean this is just a it's a redo of a lot of things is the deal so.

 **Sowells, Amy** 34:00  
OK.

 **Jonathan Aulson** 34:01  
I'll keep you posted, but I can't guarantee by go live that'll be in place. It'll be, it'll be thereabouts. Yep.

 **Sowells, Amy** 34:07  
OK.  
All right.

 **Jonathan Aulson** 34:10  
Hey, Mike.

 **Foy, Michael** 34:12  
Hey everyone, sorry I'm late. I was triple, triple booked. So here I am.

 **Sowells, Amy** 34:13  
Hey, Mike.  
Gotta love that.

 **Jonathan Aulson** 34:19  
Nice. Nice. Well, we've solved everything, so time to go home. Yeah.

 **Foy, Michael** 34:23  
OK, perfect. So we're good.

 **Jonathan Aulson** 34:28  
Yeah, just I guess as a quick recap, we've got all the pilot sites. Amy has has completed job profile mapping. So we've got, we've got a plan to to show the budgeted payroll for everyone in the pilot. So that's great.  
And that's going to buy us time while we work with Adam on what to do with everyone else. So it's a it's a huge, it's a mountain of work. Honestly, if the answer is to go through and do what Amy did manually, you know it's going to take a a a sizable team.

 **Foy, Michael** 34:51  
Mm-hmm.

 **Jonathan Aulson** 35:05  
Working non-stop to get it done, but I guess we'll need to have those conversations with Adam next week, so it's good.

 **Sowells, Amy** 35:11  
Yeah. So, yeah, exactly. So Mike, that's what we talked about. So I think Tuesday, our next grooming session call, Adam will be there. We can talk through this holistically to define like what?

 **Foy, Michael** 35:22  
Yep.

 **Sowells, Amy** 35:25  
What we want to do with budgeted hours and then once we determine the best approach there, then we think about and if it is going through every site individually, then we'll want to think through OK, who who has time to help with that? I mean, I can certainly do a large piece of it and Adam probably too, but we'll.  
Or I'll probably need a team to work through that, yeah.

 **Foy, Michael** 35:47  
Yeah.  
OK, yeah, let's see what what Adam's thoughts are on that. And then I'm sure worst case scenario, if it is manual like we we can shift some priorities around. I was gonna suggest the interns as well, but I think they are reaching the end of their internship, so.

 **Sowells, Amy** 36:08  
I know, unfortunately, yeah, I mean I was able to do those whatever 151215 sites in like 30 minutes. So and I think we can get through a large chunk with just a couple of people. But but yeah, we'll we'll talk through that next week.

 **Foy, Michael** 36:09  
Hmm.  
Yeah, but we'll figure it out.  
Yeah, yeah, I can just preemptively see see what everyone's bandwidth looks like next week on my team, so.

 **Sowells, Amy** 36:36  
OK, sounds good.

 **Jonathan Aulson** 36:38  
Well, the only other item I had, Amy, was to check in on the road map. I know, I think Brian's still out, but I I didn't know if you had any more feedback for us or anything along those lines.

 **Sowells, Amy** 36:39  
Um.  
No. So, yeah, I I'll talk to him about that. I'm planning on talking to him on Wednesday, next Wednesday, once he's back. Yeah. So I'll keep you posted there. I know. Yeah, I know. We want to determine what the next project is. So, yeah, Mike, maybe we can sidebar on that as well next week.

 **Jonathan Aulson** 36:56  
Yeah. OK. OK.

 **Foy, Michael** 37:10  
Yeah.

 **Sowells, Amy** 37:10  
Just to basically talk through, you know what what the next project is that we'd like Elena to tackle and then like long term if there's they had a couple suggestions for some additional projects too, so.

 **Foy, Michael** 37:22  
Yeah, that sounds good.

 **Jonathan Aulson** 37:24  
Cool, Dan.

 **Sowells, Amy** 37:24  
Jonathan, I did have one thing. I talked to Dave Noel earlier. I think you talked to him as well earlier in the week. And on that second risk item that we brought up during the steering committee call, he was.

 **Jonathan Aulson** 37:27  
Yeah.  
Yes.

 **Sowells, Amy** 37:43  
He called me about like the monitoring of the Great Plains batch posting. He basically, I mean, this is a little bit over my head, but he basically said there's there's no need to monitor that.

 **Jonathan Aulson** 37:50  
Yeah.  
You know, he gave that same argument to me this morning and I'll tell you what we what we tried to kind of describe. And again, this is just a recommendation, right? But the deal is that we can't see if something changes in Great Plains.

 **Sowells, Amy** 38:01  
It's.

 **Jonathan Aulson** 38:19  
And so if we are sending our data across and we're getting successful messages back, everything's great. And then and then something and then, you know, nothing on our side changes, but we start getting error messages.  
We're gonna have like we're just gonna have no ability to help, you know, understand what what happened or or react to it in any way. So you know what we're asking for is monitoring that would look at things like configuration change.  
Or an error log. Just any kind of information that would support the scenario where what's working today stops working. So you know, again, it's just a recommendation, but I I I do feel like it makes sense.  
So it's up to you guys whether or not you want to pursue it. But yeah, Dave was very vocal that he didn't think it was necessary. It's just from our perspective, you know, this is a a business critical function and we would, you know, if it were our system, we would have it monitored. So I I that's.  
That's I guess where we're at with it.

 **Sowells, Amy** 39:31  
Yeah, I'm gonna. I'm gonna trust Dave's opinion on this. He's the expert when it comes to like Town Park, Great Plains database. So I'm gonna trust his opinion, I guess just for my own benefit though.

 **Jonathan Aulson** 39:36  
OK.  
Sure.

 **Sowells, Amy** 39:48  
How it it really, it's just a count summary, right, that it relates to from a forecasting perspective, right?  
Account Summary is the only database that relies on Great Plains.

 **Jonathan Aulson** 39:59  
Testing perspective. Uh, yeah, I suppose that's true. Yep. Yep.

 **Sowells, Amy** 40:03  
OK. Yeah, I'm OK with that, I mean.

 **Jonathan Aulson** 40:06  
Yeah, chart accounts, chart accounts and account summary. We we, uh, we tie into both of those, but yeah.  
Yeah.

 **Sowells, Amy** 40:28  
Have other guardrails to make sure that doesn't happen.

 **Jonathan Aulson** 40:28  
8.  
OK.

 **Sowells, Amy** 40:34  
So yeah, I think, I think we're OK to trust Dave's opinion on this.  
Hopefully that doesn't bite US in the \*\*\* later, but I don't think so.  
What does that mean for our meeting next week? Is that was that the biggest concern we were going to bring up or is there there's other pieces to that risk, right? OK.

 **Jonathan Aulson** 40:45  
You can.  
No.  
Yeah, yeah, no that.  
Out of the set, yeah, the other ones are so the ETL processes are are we we were told they were monitored. Jim's comment in the meeting makes me think that we need to take another look at that because apparently the Legion ETL.  
I I don't recall what he said. Something about it stopped working and no one, you know, that wasn't known. So that's that's a piece that probably should be in place. And of course the data data gateway clustering is.

 **Foy, Michael** 41:22  
Yeah.

 **Sowells, Amy** 41:22  
Yeah.

 **Jonathan Aulson** 41:33  
We're we're anticipating that being done tomorrow, but we'll want to make sure that's in place. And then the the other process, oh, Azure resources at the MSP level.

 **Sowells, Amy** 41:40  
Right.

 **Jonathan Aulson** 41:53  
So stuff like the security.  
Having some kind of monitoring around those so that if it changed that, yeah, yeah.

 **Sowells, Amy** 42:01  
OK. OK. OK. Yeah, just want to make sure we we were, we still needed that meeting next week. It sounds like we definitely do. If conditions change and you get all the responses back that you need from IT, let me know and I'll push that meeting. But sounds like, yeah, we still need that Guy did respond to me and said yeah, he's happy to touch base.  
Um, on Wednesday.

 **Jonathan Aulson** 42:23  
OK, cool. Cool, cool. Uh, great.

 **Sowells, Amy** 42:25  
Good.  
Sounds good. Anything. Anything else?

 **Jonathan Aulson** 42:28  
Very good, guys.  
I think that's it. I I plan on getting you a little bit of cost information by tomorrow on that road map. My I I'm hoping that if I can get you just like a month of like a a run rate, would that be enough info as opposed to like a total cost?  
Does that make sense what I'm saying?

 **Sowells, Amy** 42:52  
Um, what do you mean?  
Like a monthly fee.

 **Jonathan Aulson** 42:58  
Versions. Um, I was trying to get you cost information for your conversation with Brian.

 **Sowells, Amy** 42:58  
That should be fine.  
Yep.

 **Jonathan Aulson** 43:05  
And um.

 **Sowells, Amy** 43:06  
Yeah. I don't necessarily think you need costs yet. Sorry, you're cutting out a little bit. It's probably my connection. Yeah, I don't necessarily think you need costs yet. I mean, if it's easy to put together, you certainly can, but we could probably.  
Tackle that after I understand, yeah, what the next project is going to be.

 **Jonathan Aulson** 43:28  
That'd be great. Honestly. Yeah, it is. It is. It's a little far out for us to price. So, yeah, that'd be great. OK.

 **Sowells, Amy** 43:30  
Yeah, no, that's fine.  
Oh yeah, understood. Yeah, I wasn't expecting that yet. So yeah, that's fine.

 **Jonathan Aulson** 43:38  
OK, cool.  
Very good. All right. Well, I think that's everything then.

 **Sowells, Amy** 43:44  
All right, well, I'm out tomorrow, so if I don't talk to you, have a Good weekend.

 **Jonathan Aulson** 43:49  
OK, you too. Thanks everyone.

 **Foy, Michael** 43:49  
Me too. Thanks everyone. Tip.

 **Sowells, Amy** 43:50  
Alright, see you guys.

 **Jonathan Aulson** stopped transcription