

AMS Update – August 16, 2019

Staff spent the past week working with the vendor on many UX (back office) items that will update system membership data. Staff is close to rolling out a few items for the MX (field), mainly reports, and continuing to close processes on the UX side.

Although we are all eager to have a fully functioning system as quickly as possible, it is important to fully understand how the process of customizing reports works. While undeniably frustrating for both the staff and the field, the report development process involves many steps to ensure the report ultimately performs 100 percent correctly. This is true of any AMS, not just the one NARFE is currently working with. Those steps are:

- NARFE and the vendor discuss the elements of the report and its purpose
- Vendor develops specs for approval; if it is a simple report, this can take just one day. If it is a complex report, as many of NARFE's reports are, it can take as much as three days
- The report is then entered into the queue, and the vendor assigns the approved specs to its internal and/or contract developers;
- Once the developers finish their work, typically within three to five days, the report is turned over to the vendor for testing;
- Vendor testing typically takes two to three days, but depends on the relative priority of other items in the queue;
- If the report fails vendor testing, it goes back to the developers;
- If the report passes vendor testing, the report is then turned over to NARFE for testing, which typically takes two days;
- If necessary, a report may be returned to the vendor, and then possibly back to the developers, for redevelopment, which typically takes five days;
- After that, retesting is performed by the vendor, which typically takes two days;
- The corrected report is then returned to NARFE for retesting, which typically takes two days;
- Only when the report passes both vendor and NARFE testing is it considered complete.

From beginning to end, development of each report can take 15 days, or as much as 35-40 days if repeated redevelopment and retesting are required. There are dozens of reports moving through various stages of this development process at any given time.

#### Completed Items:

- MX – Officer Portal: Federation Officer Report updated and now showing correct information
- MX - Federation Officer List now includes member ID as well as chapter and position code columns
- MX - Reinstalled “Update Officer” button on the federation and chapter areas
- MX - Reviewed and cleaned data for federation officers to display in correct region
- UX/MX – All chapter rates have been updated in the system and are now displaying correctly on the MX (NOTE: This is an example of how, when an item is corrected in the UX, it is automatically corrected in the MX)
- UX – Vendor and NARFE completed work on the monthly closing process and deferred revenue files. This is a back office activity and remains invisible to the field. This process will allow for accurate financial reporting

	Description	Status	Expected Completion	Notes
1	<b>Reports - All custom</b>			
	A220 - Chapter Financial	NARFE testing	Open	This report is being tested by NARFE to ensure transferred members are accurately accounted for. On 8/15/19 NARFE and the vendor communicated on how to test those members. All other areas of membership have been tested successfully on the report.
	M110 - Membership Summary Report	Vendor testing	Open	NARFE provided all necessary feedback on this report to the vendor. The final testing is being done by the vendor on 8/19/19 will be turned over to NARFE next week.
	M260 - Monthly Recruiter Report	Vendor testing	Open	Developers completed work on this report, and it is now at the vendor for testing. NARFE will get the report to test thereafter.
	W101 - OPM Report	Vendor retesting	Open	The vendor tested this report on 8/7/19. The report went back to the developers and will be returned to NARFE once the vendor completes its retest.
	UX Chapter Import to Accounting system	Vendor redeveloping/testing	Open	The vendor tested this report, and it failed. This report is used by staff to upload all chapter dues payments received into the accounting system. Staff will update once the vendor retests.  HQ made the June payment two weeks ago and will make the July payment on 8/19/19. These are estimated amounts based on actuals from May 2019; adjustments will be made in the future.
	UX Federation Import to Accounting system	Vendor retesting	Open	The vendor tested this report on 8/7/19 and turned it over to NARFE for testing. Report is back with the vendor.
	M-102 Federation 10% Report	Report with developers	Open	The report is currently with the vendor's development team and will be turned over to the vendor once completed. NARFE expects an update next week.  Federations have received the June payment and will receive July payment on 8/19/19. These are estimated amounts based on May 2019 actuals; adjustments will be made in the future.
	M-112 Report	Report with developers	Open	Once the developers return the report to the vendor and it's successfully tested, NARFE will test it. Staff will update the status next week.
	M-130 recruiter Report	Report with developers	Open	Vendor has this report in the development stage.
	Other reports	Specs stage	Open	The vendor is working with NARFE to gather specs on many additional customized reports. NARFE requires a uniquely large variety and complexity of reports. These reports include the recruiter reports, the activity report and other financial reports.

2	MX - Member Login	Login process redesigned	8/18/19	NARFE and the vendor worked to simplify the MX login for members, where members and non-members will go down different paths. The login script was completed in the test site. One item remains, which is developing a contact page for members who are still experiencing difficulty logging in and need assistance from HQ. The login script and the contact us page go together.
3	Labels	Report with vendor for correction		Staff completed testing on 8/9/19 and returned the report to the vendor. NARFE retested this report on 8/16/19. Report passed NARFE testing for chapters but failed for federations. NARFE sent the report back to the vendor to fix the federation issue.
4	Membership dashboards	Vendor adjusting data	8/25/19	This will allow NARFE to look at all member information in real time in a dashboard view, including drop members, new members, deceased counts and total members. Vendor is verifying that the data is being pulled accurately. NARFE expects to receive an update from the vendor the week of 8/19/19
5	All PAC Reports	A-250 report with NARFE for testing  A-211 report specs being approved by NARFE	8/16/19	The A-250 PAC report was tested by the vendor and is now with NARFE for testing. NARFE will test the report the week of 8/19/19. This report is not needed until September 2019.  The A-211 PAC report was developed using an out-of-the-box system feature. Upon further review, it was determined that the full complexity of the report required customization with a developer. Specs being approved by NARFE the week of 8/19/19.