

## SmartStream Coordination Meeting Minutes May 4, 2004

Attendance: Sophia Bedard; Pete Bostian; Larry Cosley, Ken Dinsmore, Ed Green, Randy Keller, Beth Kelly, Mel Lambert, Cathy McClintock, Jim Racheff, Lori Smith, Mark Testerman

1. SmartStream 7.0 Beta Site Test: Pete reported that Mel had received an inquiry from GEAC regarding the NCI-Frederick becoming a beta test site for SmartStream 7.0. Pete has submitted paperwork necessary for consideration to become the test site for the SQL Server version. GEAC is considering our request although there is a snag with reference to a cost which may be incurred because of the platform change from Sybase to SQL Server. Pete responded to GEAC indicating that we do not feel that we should pay to test the new version, but once SmartStream 7.0 is released, and if we decide to change platforms, we will initiate a platform change through GEAC.

Pete also noted that Accounts Payable is still experiencing problems caused by canceling invoices while the match job is running.

Mel Lambert will be attending the GEAC Alliance and Pete requested she attend the session on Platform Change.

Pete also reported that C&SS is experimenting with the installation of SmartStream via Marimba to create an auto-install of the application on a client computer.

2. Receiving Issues: Pete and Sophia addressed several Receiving issues that came up during the past month. One was the change to the presentation of Access reports caused by an upgrade of the computers in Building 1050 to Office XP. Reports now default to page view whereas previously they were presented in full screen mode. Since the user can change views by clicking on the report, they felt that modifying all the SmartStream reports to change the default view mode was unnecessary; however, Sophia did change the delivery ticket report on the computers used by Receiving.

Another issue was the request from Karen Cowden to modify SmartStream for access to Receiving and Purchase Order comments from the Receiving activity. Pete noted that C&SS could not modify the software and he did not think that having GEAC or anyone else do so was a good idea. Randy and Mel pointed out that the reason for the request was to implement a new purchasing policy whereby receiving would no longer enter receipts and returns for items they refused to accept because of damage, etc. Instead they would add a comment to the purchase order indicating that the item was not accepted. Discussion

followed on how to handle this situation in SmartStream. Pete thought that the best way was to continue entering the item as received and then immediately issue a return so that an audit was maintained. Using a comment field makes it difficult to trace an action through the system. Randy and Beth noted that this is a procedural issue that should be addressed with Purchasing and Receiving.

3. PCard Report Changes: Pete reported that the Pcard reports are being revised so that they are uniform in sort order (by card holder name) and card identification.
4. DOIM: Pete reported that the old systems, HR and Financial data remaining at DOIM have been deleted – the core data having been moved to our archive database. Discussion followed regarding what systems remain at DOIM.

The next meeting will be held Tuesday, June 1, 2004, at 9 AM in the Building 362 Conference Room.