# UNC Charlotte – Facilities Management

## Key Mgmt Phase 2 Development Review Meeting Minutes

**Aug 29, 2011**  
**Location:** FM 119  
**Time:** 2:00 pm – 3:30 pm

### Purpose of Meeting:
This workgroup meeting is being held to ensure that the requirements for Key Mgmt Customers are clarified and documented for Phase 2 of the Key Management system implementation. Documentation of these requirements will ensure that all processes and procedures are satisfactorily captured according to the stated expected outcomes.

<table>
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<tr>
<th>Facilitator:</th>
<th>Ray Dinello, FIS Director</th>
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<tbody>
<tr>
<td>Meeting Coordinator:</td>
<td>Pamela Duff, Business Solutions Coordinator</td>
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| Attendees: | Rob Herrington, Dan Rowe, Jerry Mann, Lee Jefferson, Gail Keene, Lee Snodgrass, Mark Reynolds, Jessica Deal, David Champion, Fred Brillante, Neil Miller |
| Absentees: | Lyn Woodruff, Alicia Scott, Jeff Rabon, Michael Shafer |

## MEETING OVERVIEW

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Attendees</th>
<th>Facilitator</th>
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<tr>
<td>2:00 PM</td>
<td><strong>Introduction</strong></td>
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<td>2:10 PM</td>
<td><strong>Development Review- Key Mgmt Processes Functionality</strong></td>
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<td></td>
<td>• Review ARCHIBUS Key Request and Approval work flow</td>
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<td>➢ Ray reviewed the current work flows that were defined from previous meetings</td>
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<td>• Demo ARCHIBUS Key Request and Approval</td>
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<td></td>
<td><strong>Submitting the Request</strong></td>
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<td>o The Requested For is defaulted. Customer must enter the bldg code and then select next to select room numbers for the key request and add any comments before submitting</td>
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<td>o Will highlight the text (instructions) to make easier for customer</td>
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<td>o Customer has ability to save the key request for later submitting if they need to obtain additional info</td>
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<td>o The Manage Key Requests queue allows editing and viewing of all current key requests</td>
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<td>o The Summary review allows viewing of work flow statuses of key request approvals</td>
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<td><strong>Approval</strong></td>
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<td>o Department approval-process key requests: if the hook number is known then the dept approver or building liaison may enter the info into the comments</td>
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**Requirement:** Email needs to include the comments so they are visible by all.
May approve selected rooms on the key request

Once all are approved within a specific key request then the entire key request will disappear from the approver queue.

Maintenance screens are available for assigning the department approver. The bldg liaison list will be used for the building approvers.

**Requirement** Increase key room id to be increased to a 5 digit code to differentiate between key request ID

**Action:**
Test script will be sent to be used for customers to test the module
FIS will add the customer group to the key mgmt access for testing

**Requirement:** building liaison will be sent an email notification when a key has been issued/picked up.

**Phase 3:** Inquiry about ability to add multiple persons for one specific key
Report needs may be added to requested items during the testing

FIS will discuss with Rob concerning the Issue of keys along with the Inventory
Phase 3 will focus on the Management of keys within Keys boxes and issue from inventory process

Fred mentioned that there is still the problem with incomplete hardware data for buildings
Rob discussed how filters will need to be set up since sub masters and masters for buildings will be a separate process

Report to display who has access; also a list of rooms with the list of keys that open that door.
Currently there are 6 levels of key access

Mark wants to see how the set up is completed with Rob. Ray stated that after we complete phase 2 we will move forward to phase 3 and then concentrate on requirements for phase 3 for Key Custodian access to review/assign keys

Building liaisons and dept approvers will be able to set up the individual room approvers.

**Continued Review _ PHASE 2 Testing Process**

**Schedule Review:**
Ray reviewed the schedule for testing: set up and training which is scheduled for November / December timeframe.
User Acceptance testing (UAT) will occur for one month.
ACTION: FIS will schedule UAT reviews for follow up in October.

Need to add the building name to the email notifications
Begin Key Mgmt notifications in November

Pilot will begin in December through March timeframe. We will run a dual system with both paper and electronic key requests.

Go Live will be March 2012
We will send a link for the Testing Demo along with a script for submitting and approving key requests.

**Additional Discussions/Decisions**
Determination that once Go Live that provide a Link of form on FMWeb to the ARCHIBUS key request form (electronic)

**Meeting Wrap Up**

**ACTION ITEMS**

Next Steps: User Testing
1. FIS will provide access to customer group to access testing db
2. FIS will send
   a. DB link
b. SOP draft and
c. test scripts for testing to begin Sept 1

3:15 PM  Adjourn