

# IT Briefing

December 17, 2008



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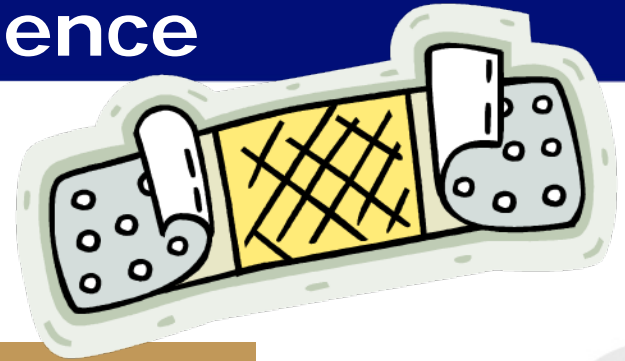
## Agenda

- Cascade
- Verizon & AT&T
- Project Compass
- Lee Clontz
- Wade Sanner
- Scott Swann

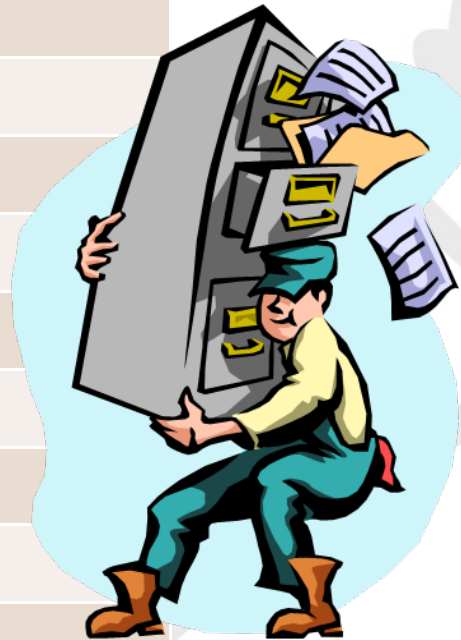
# Moving Day

## One More Plea For Patience

**JANUARY 7<sup>th</sup> !!**



Department	Locations
Academic Services	Library & Cox Hall
Call Center	ECLH
Enterprise Applications	1599 & NDB
Enterprise Services	NDB & 1762
Infrastructure	NDB
Integration	NDB
ITF&A	1762
ITSMO	1762
PMO	NDB



# Cascade

Lee Clontz



# Cascade

## The CMS Initiative

- Driven by need for CMS to support new Homepage, news, strategic plan, campaign sites
- Cross-functional team from ECG, SOM, SPH, College, UTS

# Cascade

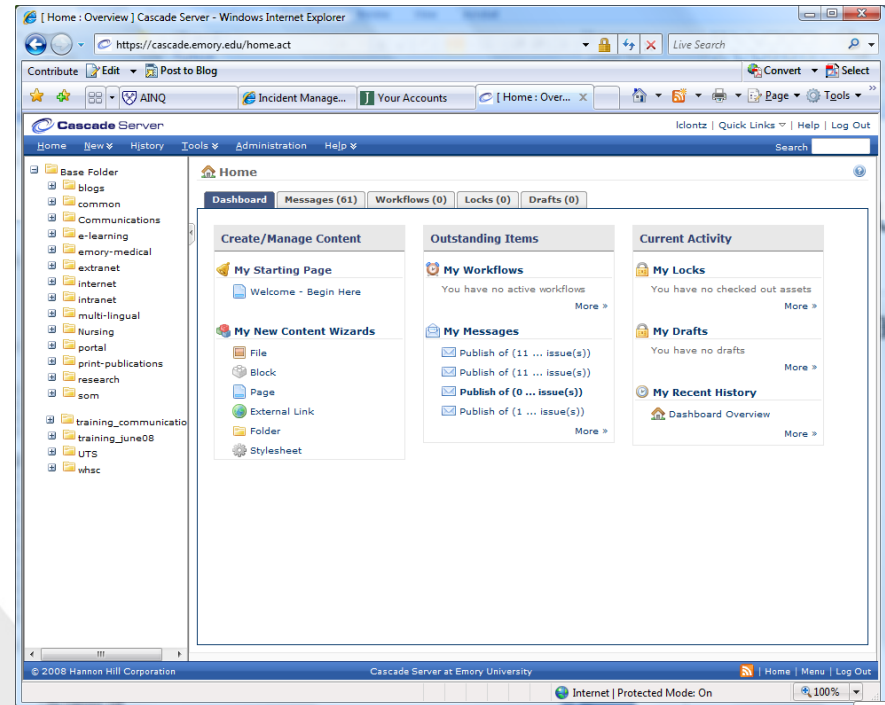
## Why Hannon Hill?

- Focus on higher education clients
- Strong support
- Glowing recommendations
- Local company
- “Right fit” product

# What is Cascade?

## What is Cascade?

- Web Content Management System
- Designed for site templating, easy content updating
- Entirely browser-based
- “Push” publishing



# Cascade

## Features

- Workflow
- Permissions
  - Multilevel group perms
- Content sharing
- Import of Dreamweaver templates
- WYSIWYG editing (TinyMCE)
- Content expiration
- Version control
- Customizable metadata
- Structured data input
- Content drafts
- Link checking
- Automatic Navigation



# Cascade

## Limitations

- Cascade designed for publishing of static pages
  - *Can* publish .php or .cfm pages, but not made for a dynamic site
- Roles are currently fixed
- Authoring and administering site requires training
  - XML/XSL at the heart of everything
- Permission model can get complex

# Cascade

## Roles & Responsibilities

- UTS:
  - Accounts
  - Provisioning
  - Standard template deployment
  - Publishing to UTS Web Hosting environment
- Local Support:
  - Custom development
    - Hannon Hill available for fee based consulting services
  - Content creation
  - Workflow

# Cascade

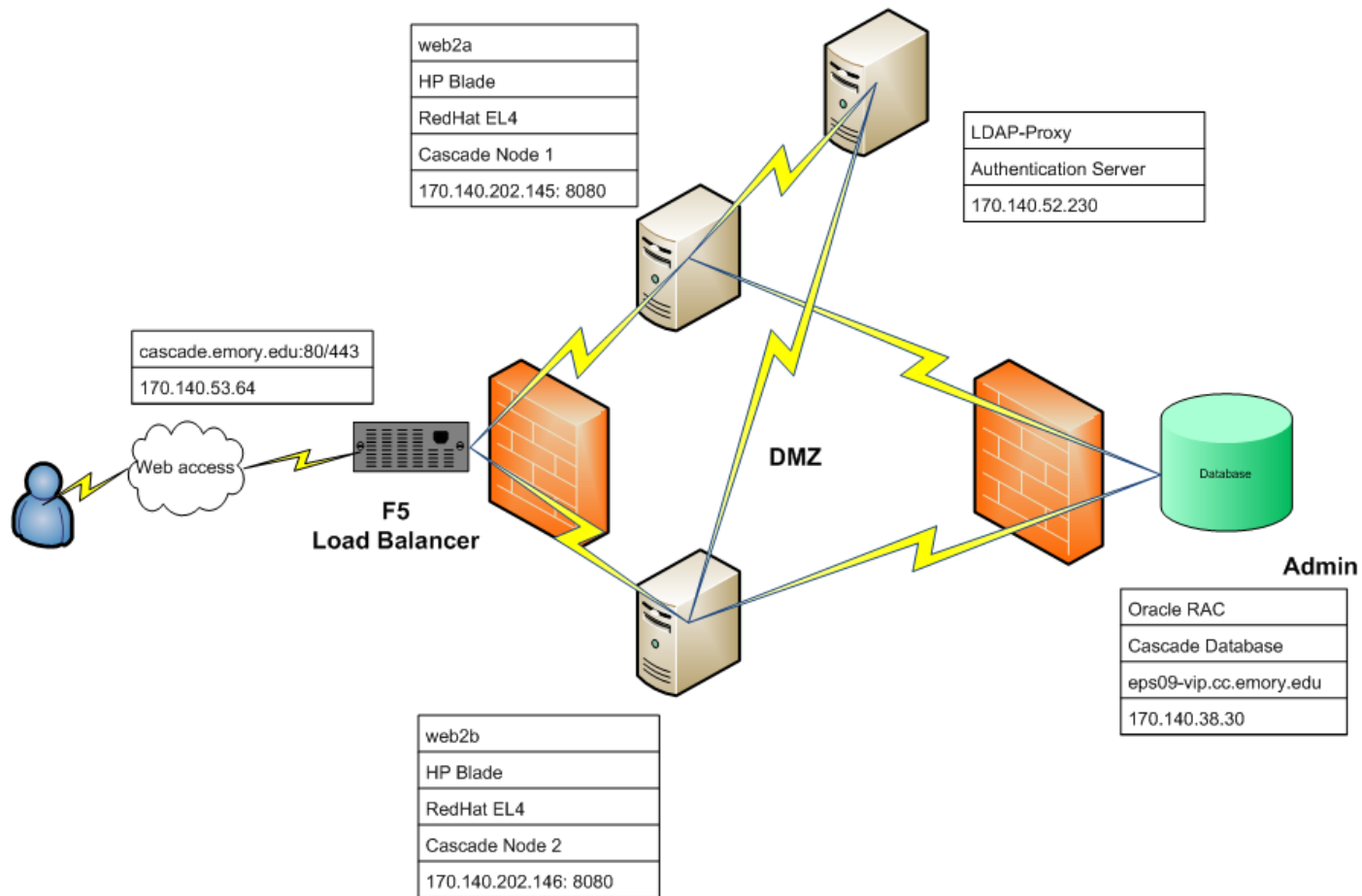
## Architecture

- Two load-balanced nodes fronted by F5
- All traffic is SSL-encrypted
- Cascade runs atop Tomcat
- LDAP-authentication (Idap-proxy)
- Oracle General RAC

# Cascade

## Architecture

### Cascade Server




## Permissions


- All permissions assigned at group level
- Group types
  - Contributors
    - Can add and edit content and start workflows
  - Approvers
    - Can approve or edit content in a workflow
  - Publishers
    - Can publish content to a site
  - Managers and Administrators
    - Not generally going to be provisioned

# Cascade

## New "General Use" Template

SCHOOLS LIBRARIES RESOURCES SEARCH EMORY


EMORY
Strategic Plan | 2005-2015

HOME	THE PLAN	PROGRESS	BACKGROUND	CONTACT
<p><b>Learn about the plan</b></p> <ul style="list-style-type: none"> <li>President's Letter</li> <li>President's Overview (e-flash)</li> <li>Detailed Plan (PDF 884KB)</li> <li>Executive Summary (PDF 312KB)</li> <li>School &amp; Unit Summaries (PDF 468KB)</li> </ul>	 <p style="font-size: 10px; color: #003366; margin-top: 5px;"><i>A destination university internationally recognized as an Inquiry-driven, ethically engaged, and diverse community, whose members work collaboratively for positive transformation in the world through courageous leadership in teaching, research, scholarship, health care, and social action</i></p>		<p><b>The Five Pillars of Courageous Inquiry</b></p> <ol style="list-style-type: none"> <li>I. University-Wide Strategic Goals</li> <li>II. Individual School &amp; Unit Plans for Preeminence</li> <li>III. Cross-Cutting University-Wide Themes &amp; Initiatives</li> <li>IV. Creative Implementation Strategies</li> <li>V. Growing &amp; Leveraging Our Institutional Resources</li> </ol>	
<p><b>Emory Administration</b></p> <ul style="list-style-type: none"> <li>President's Office</li> <li>President's Cabinet</li> <li>Provost's Office</li> <li>Secretary's Office</li> <li>EVP for Finance &amp; Administration</li> <li>EVP for Health Affairs</li> </ul>	<p><b>News &amp; Announcements</b></p> <ul style="list-style-type: none"> <li>• Anubis Arrives in Atlanta for Tut Exhibit</li> <li>• Emory Law Honors 2008 Distinguished Alumni Award Recipients</li> <li>• AAMC Honors Immunologist Max Cooper</li> <li>• Institute of Medicine Elects Emory University School of Medicine Faculty Member</li> <li>• Emory Purchases Papers of Journalist Marshall Frady</li> <li>• Emory Employees, Students Can Win \$1,000 in Annual Building Energy Competition</li> </ul> <p style="text-align: right; font-size: 10px;"><a href="#">View all Emory news</a></p>		<p><b>Give to Campaign Emory &gt;&gt;</b></p>  <p style="text-align: center; font-size: 10px;"><a href="#">MAKE A GIFT</a></p> <p><b>VIEW FACULTY PROFILES</b></p>  <p style="text-align: center; font-size: 10px;"><a href="#">LEARN MORE</a></p>	

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[HOME](#)[THE PLAN](#)[PROGRESS](#)[BACKGROUND](#)[CONTACT](#)[The Plan](#)[Read the Plan](#)[Schools & Units](#)[Strategic Themes](#)[Implementation Strategies](#)[Infrastructure](#)[LEARN MORE](#)

## The Plan

**Emory University's core purpose is to create, preserve, teach, and apply knowledge in the service of humanity.**



Emory's *Where Courageous Inquiry Leads: 2005 - 2015 Strategic Plan* provides a means to build upon the University's strengths and create a vibrant future. The goals and strategies expressed in the plan will allow Emory to achieve its vision of becoming a destination university, internationally recognized as an inquiry-driven, ethically engaged, and diverse community whose members work collaboratively for positive transformation in the world through courageous leadership in teaching, research, scholarship, health care, and social action.

Based upon this strategic plan, Emory will secure and direct resources, take action, and measure progress. Emory is committed to the strategic planning process which turns shared vision into action by charting a course for growth and development. The plan is built upon the aspirations of all students, faculty, and staff that intersect in a common set of goals and key University-wide priorities.

Emory has identified four strategic goals:

- Emory has a world-class, diverse faculty that establishes and sustains preeminent learning, research, scholarship and service programs.
- Emory enrolls the best and brightest undergraduate and graduate students and provides exemplary support for them to achieve success.
- Emory's social and physical environment enriches the intellectual work and lives of faculty, students, and staff.
- Emory is recognized as a place where engaged scholars come together in a strong and vital community to confront the human condition and experience and explore 21st-century frontiers in science and technology.

The first three goals reflect the core elements of how Emory will achieve its vision -- strengthening faculty distinction, preparing engaged scholars, and creating community-engaging society. The last goal focuses on what Emory will contribute to local, national, and international communities through inquiry focused on the tough issues facing society and by developing cutting-edge programs focused on leading research, scholarship, and social action.

### Strategic Plan Quick Links

[Overview Graphic \(PDF 36K\)](#)[Implementation Structure \(PDF 121KB\)](#)[Plan Documents](#)[Status Reports](#)[Updates and Highlights](#)

# Cascade

## XML/XSLT

- Cascade sites built almost entirely with XML/XSLT
  - Templates
  - Stylesheets
  - Workflows




Bright Ideas: Overview - Windows Internet Explorer

http://brightideas.emory.edu/


Contribute Edit Post to Blog Convert Select

CASES ... Incident... CLP Ma... Digg - 1 ... Brig... x



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**EMORY**  
UNIVERSITY



## Bright Ideas at Emory

- Overview
- Award Criteria
- Process
- Instructions
- Submission Tips
- Important Dates
- FAQs
-  **Submit a New Idea!**
-  **View previously submitted ideas**

**Do you have a **Bright Idea** that will save Emory time, money, or improve work life?**

Can you identify strategies that will make Emory more efficient or effective?

Employee talent and expertise are an invaluable asset at Emory. We're looking for problem-solving ideas best created through the imaginations of our employees. You know your job better than any outside expert so if you have an idea for a new initiative or a solution to a workplace challenge, big or small, we want to hear about it.

Emory is focused on providing the highest quality work processes and improving the lines of communication. Our success depends on your input and participation. Let us know how we can:

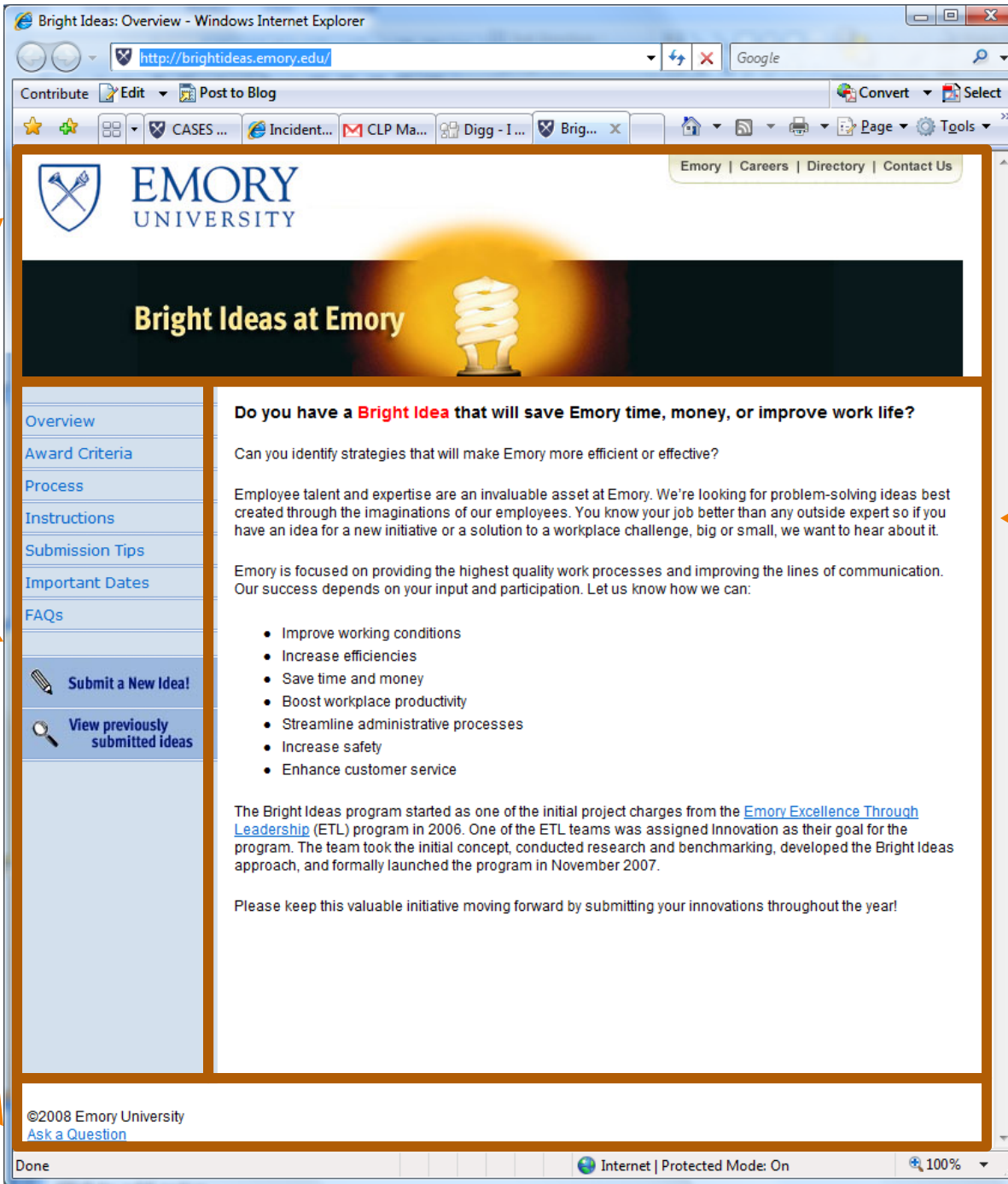
- Improve working conditions
- Increase efficiencies
- Save time and money
- Boost workplace productivity
- Streamline administrative processes
- Increase safety
- Enhance customer service

The Bright Ideas program started as one of the initial project charges from the [Emory Excellence Through Leadership](#) (ETL) program in 2006. One of the ETL teams was assigned Innovation as their goal for the program. The team took the initial concept, conducted research and benchmarking, developed the Bright Ideas approach, and formally launched the program in November 2007.

Please keep this valuable initiative moving forward by submitting your innovations throughout the year!

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[Ask a Question](#)

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# Cascade

## Demonstration

- <https://cascade.emory.edu>



# Cascade

## Training Opportunities

- UTS-taught “Introduction to Cascade” on Jan. 5 at 2 p.m.
  - Please RSVP to [iclontz@emory.edu](mailto:iclontz@emory.edu)
- Hannon Hill-taught XSLT class on Jan. 6-7

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# Questions

# Cellular Services

Wade Sanner



# Cellular Services

## RFP Process

### RFP Criteria

Commitment to on-going investments to improve signal strength

On-site assistance in managing billing issues with a focus on bill optimization

Improved pricing on devices and services

On-site services to support University and HealthCare personnel with device issues and/or replacements

Requirements for emergency notification systems met

Changing provider must be at no cost to Emory

### Verizon selected as Primary Cellular Services Provider

AT&T was not able to meet 'no-cost switch' criteria, or 'no-cost signal upgrades.'

A contract was awarded to AT&T to support iPhone initiatives and improve existing discounts

# Cellular Services

## Verizon

### New Verizon Agreement

Improved pricing on services (23% discount from 22% current)

On-site assistance in managing billing issues with a focus on bill optimization

Improved discount on devices and free Blackberry Curve 8330 for new subscribers and customers eligible for an upgrade

Replacement units provided to manage device issues and/or replacements

Requirements for emergency notification systems met

“Share” fees waived to allow no cost optimization/consolidation.



# Cellular Services

## AT&T

Currently there are 240 Emory corporate paid lines through AT&T

Discount rates will improve from 15% to 22% on corporate-paid lines

Employees will continue to be eligible for a 15% discount, and Students will now be extended a 10% discount.

iPhones are not eligible for equipment discounts, but services will move to an improved discount percentage.

# Cellular Services

## Maximizing Verizon Agreement

### Value of Consolidation and Optimization

- Reduce/eliminate cost of unused minutes (\$1.1 million over the 3 year contract)
- Streamline payment process by moving 590 current Verizon accounts to one University Verizon account. Eliminate paper bills.
- Create an approval process for obtaining cellular services and devices
- Use of “My Business” web portal to allow individual access to review minutes, and administrative review access to view bills and statements.

### Path to Consolidation and Optimization

- Staged migration of business units into a single corporate account
- Identify list of Approvers for business units on campus
- Give Approvers access and training for “My Business” web portal
- As more lines move into corporate plan, most users will move to less expensive plans
- All new accounts set up under consolidated account

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# Questions

# Project Compass

Scott Swann



# Project Compass

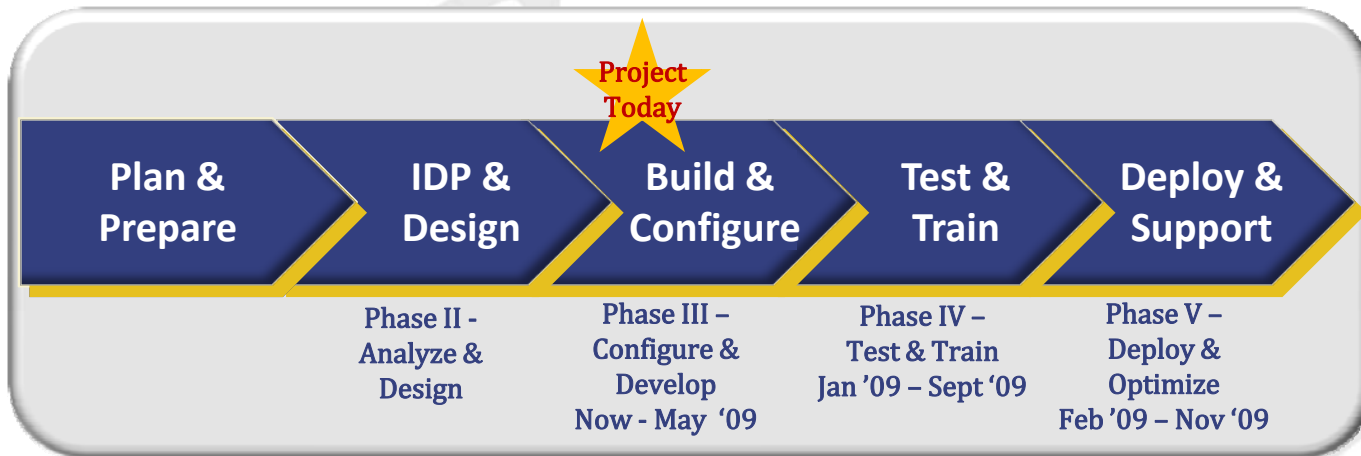
## Team

### Project Compass Team

<b>Cross Functional Leaders</b> Cliff Merzell Jason Jacobs		<b>Technical Coordinator</b> Scott Swann		<b>Project Director</b> Christopher Uher		<b>Project Management Office</b> Linda Erhard, Lead Frances O'Neill		<b>Organizational Change Management (OCM) Team</b> Teresa Hauck, Org'l Change Mgt. Team Lead Charles Walker, Training Lead Debie Drucker Liz Daunt-Samford Jennifer Stevens, Communications Lead Michelle Berthiaume	
<b>AP &amp; Expense Purchasing (Univ)</b> Joy Coburn, Co-Lead Vivian Mallory, Co-Lead Haniya Vaid Deborah Clement Jennifer Hulsey Mark Hafitz Pam Hancock Stephen Frangis Vinnetta Golphin-Wilkerson Adeola Eluem Michael Downey		<b>Asset Management</b> Matt Carpenter, Lead Renee Corsello Charlie Lawson Faye Harris Thomas Barr Jeff Odem		<b>Billing &amp; AR</b> Deanna Walker, Lead Sonya Hearn Kathryn Turner Lisa Smith Liz Daunt-Samford Mike Jacubenta Eric Pallay Glenda Harrison		<b>Commitment Control</b> Larry Cain, Co-Lead David Giles, Co-Lead Dana Pelt Jerry Lockamy Fay Greenholtz		<b>Champions of Change Advisory Group for OCM Team</b> 1. Amy DeMore 2. Ben Tompkins 3. Carla Chandler 4. Debbie Moyers 5. Deepa Pawate 6. Joan Coonrod 7. Julie Moricle 8. Kenny Hemmer 9. Laura Papotto 10. Liz Daunt-Samford 11. Mary P. Smith 12. Melissa Kuskie 13. Steve Culler 14. Steve Stoffle 15. Steve Zaubi 16. Una Newman 17. Untra Randle	
<b>General Ledger</b> Larry Cain, Co-Lead David Giles, Co-Lead Selene Massey Controllers Fay Greenholtz David Reefer		<b>Grants</b> Janette Hannam, Co-Lead Urvi Patel, Co-Lead Kathy Simmons Christine Bullard Melissa Kuskie James Goff Wil Brown Celia Gravely Shannon Hoffman Sumreen Ahmad		<b>Human Resources</b> Rob Vannah, Lead Michael Northrup Theresa Pajor Angela Brady-Williams		<b>Student Administration</b> Tim Araiail, Lead Don Mcvay Kurt Haas Therese May Matt King Jack Metropol Cynthia Wood			
<b>Conversion</b> Matt Carpenter, Lead Selene Massey		<b>Technical</b> Tom Vincent, Lead Curt Stauffer Dave Maddlone Gerald Mosley JoAnn Dodson Scott Caillier Vickie Ellis		<b>Reporting</b> Steve Hall, Lead Brooke Moore Dana Pelt James Goff Lynn Johnson		Mark Hafitz Shannon Turner Tony DiPaola Mary Lou Moynihan Ralph Soucie		<b>Legend</b> Full Time – Emory Part Time – Emory Subject Matter Expert – Emory Partner	
<b>Security</b> Donna LeDoux, Lead Subash Krishnamurthy									

# Project Compass

## Timeline



# Project Compass

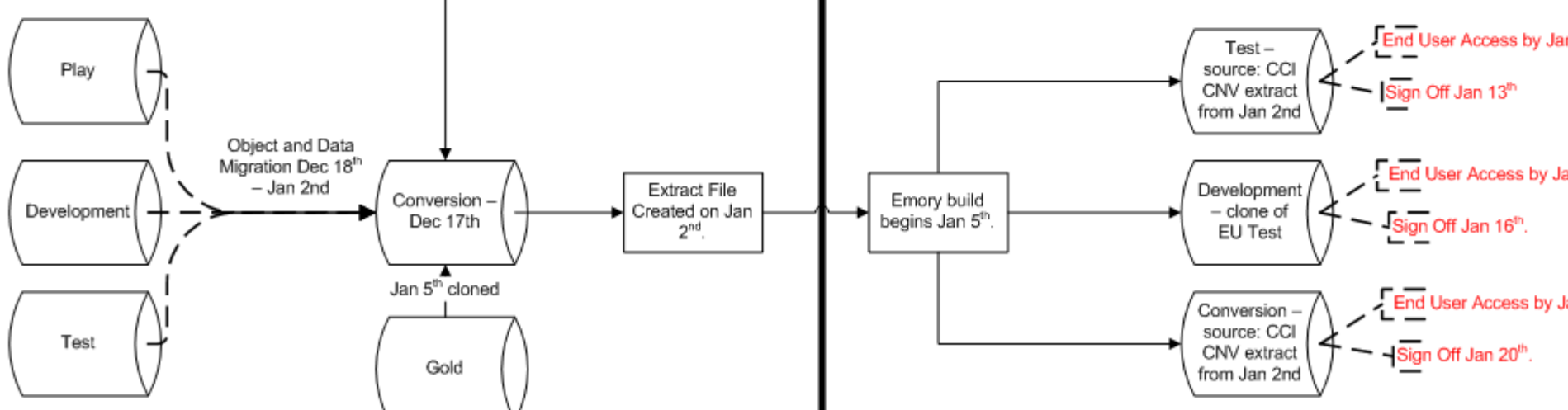
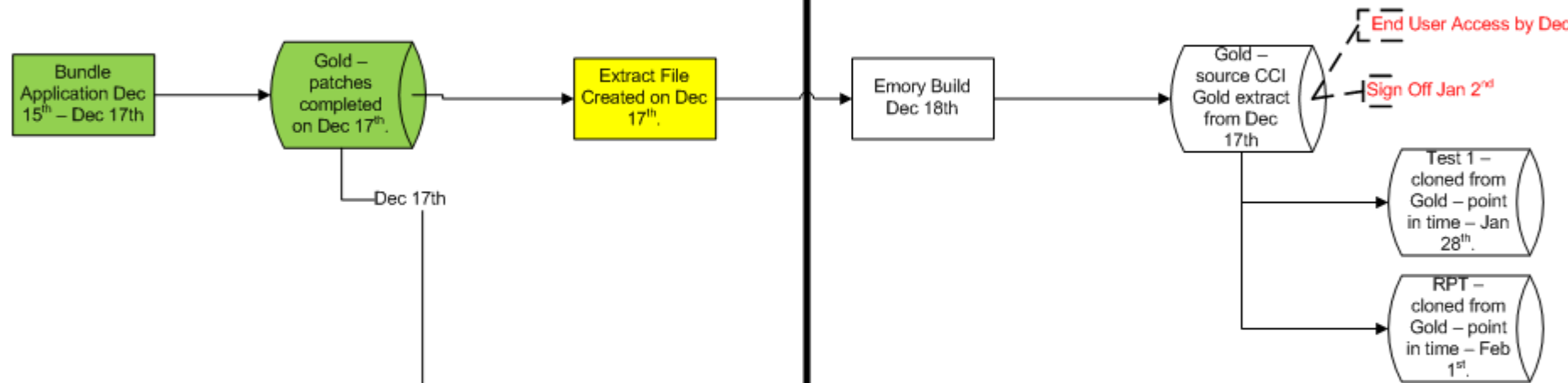
## Environment Overview

Database	Description
DMO	Delivered Demo data.
GLD	Production staging area for configuration and development
TST	Functional configuration and unit testing
DEV	Developer development and unit testing
CNV	Conversion testing ground
RPT	Disruptive experimental activities
TS1	System Testing
TS2	Integration Testing
TS3	User Acceptance Testing
TR1	Formal Training
TR2	Formal Training
PRD	

■ - Green is a completed task  
■ - Yellow is a task in progress

# CCI

# Emory





# Project Compass

## PSFIN Modules

- General Ledger
- Commitment Control
- Accounts Payable and SciQuest/PMM
- Asset Management
- Travel and Expense
- Billing
- Accounts Receivable
- Grants Management
- Project Costing

# Project Compass

## Chart of Accounts - SmartKey

Seq #	Field Name	Req/Opt	Type	Length
1	**SetID	R	Char	5
2	Sm_Ky_Smart_Key	R	Char	10
3	DESCR100	R	Char	100
4	EFFDT	R	Char	10
5	Eff_Status [I,A]	R	Char	1
6	Business_Unit_GL	R	Char	5
7	Operating_Unit	R	Char	8
8	DeptID	R	Char	10
9	Fund_Code	R	Char	5
10	Class_Fld (NACUBO)	R	Char	5
11	Program_Code	O	Char	5
12	ChartField1 (Event)	O	Char	10
13	Business_Unit_PC	*R	Char	5
14	Project_ID	*R	Char	15
15	Activity_ID	*R	char	15

\*Required only if Project/Grant

\*\*Select SETIDs: EMUNV, HCEHC, SHARE

# Project Compass

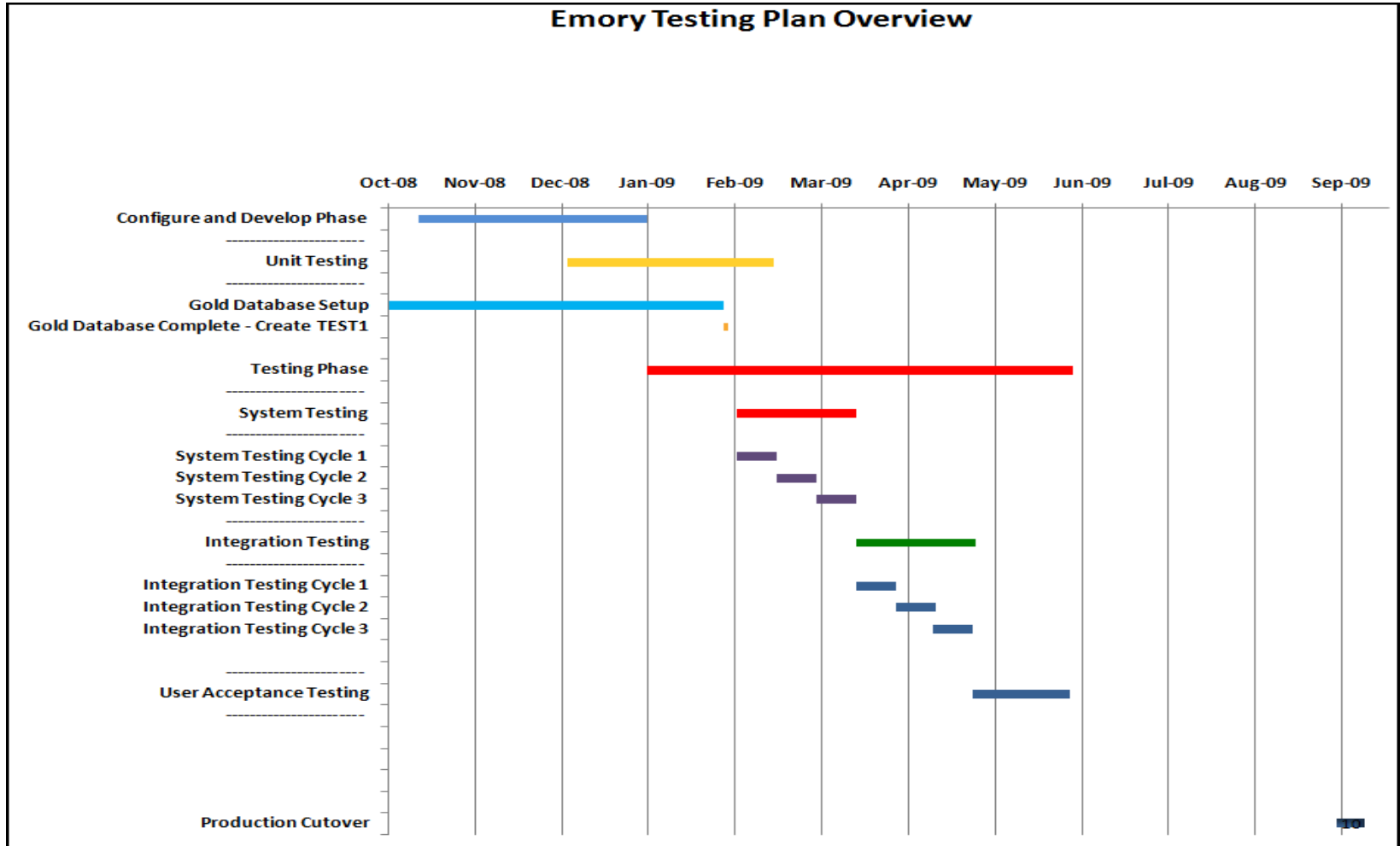
## Chart of Accounts – Account File

Seq #	Field Name	Req/Opt	Type	Length
1	*SetID	R	Char	5
2	Account	R	Char	10
3	DESCR	R	Char	30
4	EFFDT	R	Char	10
5	Eff_Status [I,A]	R	Char	1

\*Select SETID's: EMUNV, HCEHC, SHARE

# Project Compass

## Test Plan Overview





# Questions

