IT Briefing Agenda

- Alma + Primo Migration
- COMPASS Update
- Messaging Team Updates

- Graydon Kirk
- Dave Miller
- Jay Flanagan
Graydon Kirk
Project Manager II, Project Management Office

Alma + Primo Migration Project
Implementation Date 12/21/15
Alma + Primo Migration Project

- Part of the Library Portfolio

<table>
<thead>
<tr>
<th>Number</th>
<th>Project Name</th>
<th>Planned Start Date</th>
<th>Planned End Date</th>
<th>Percent Complete</th>
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<tbody>
<tr>
<td>PRJ00052</td>
<td>EZProxy SSO/Authorization for Electronic</td>
<td>2013/12/09</td>
<td>2015/08/11</td>
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<td>2016/03/04</td>
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<td>2015/02/09</td>
<td>2016/08/31</td>
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</tr>
</tbody>
</table>

- Migrating Aleph to Alma + Primo (same vendor)
- Private Cloud, SaaS, Multi-Tenant, Workflow Based
- Authentication for Shibboleth
- Availability 24 – 7, 365
Alma + Primo Migration Project

- **Supports:** (new versions supported @ 20% usage)
  - IE 8 & 9
  - Firefox 3+
  - Chrome 6+
  - SSL Encryption (Alma to Primo using SFTP)
- **ExLibris Operational Centers Located In:**
  - Amsterdam
  - Chicago
  - Singapore
- **ISO Certified 27001 & 27002**
Phase I – Process Mapping & ExLibris Preparation

• **Process Mapping:** September 2014 – April 2015
  - 5 Functional Area Work Groups (FAWGs) Staffed by 34 FTEs
  - Produced 191 Process Maps

• **ExLibris Preparation:** Work-in-Progress
  - ExLibris Configuration Document – Complete and Submitted
  - ExLibris Migration Document – Work-in-Progress
  - Christopher Spalding is Requesting Every Reasonable Item Early (PM Name, Certification Training, etc.)
Phase II – Alma + Primo Migration

- **June:** Build Foundation – Project Planning, Sandbox, Watch Videos

- **July:** Lots of Training and Q&A Sessions; Last Third of Month, Initial Data Load and Verification + Set-up Primo Environment

- **August:** More Iterative Training, Testing and Data Verification Configure Primo

- **September:** Workshop ExLibris Preparation: Work-in-Progress Load Alma Data Into Primo then Testing, Testing, Testing

- **October - December:** Execute Cutover Plan (Not received yet)
Dave Miller
Director, PeopleSoft Financial Project
Office of Finance Systems & Data Analytics
Compass Outreach Session
Compass Outreach Sessions

Purpose:
To engage the Emory community and provide high-level information on approved business cases. We may not be able to answer really specific questions because we are currently in the Design Phase (in other words, we are in the process of figuring out the HOW).

Topics:
Focus topics for this quarter are the Accounts Payable and Travel and Expense modules. Focus topics will change as the project progresses.

Audience:
Sessions are scheduled across campus for convenience, but each session is open to the entire Emory community.
We’ll be back in your neighborhood...

Check the [website](upgrade.compass.emory.edu) for information on future Compass Outreach Sessions

upgrade.compass.emory.edu
Agenda

• PeopleSoft History at Emory
• Program Governance
• Why Upgrade Now?
• Program Guiding Principles
• High-Level Roadmap
• What Does This Mean for Me?
• Business Case Inventory:
  - Accounts Payable
  - Travel & Expense
Compass (PeopleSoft) History at Emory

- Compass is Emory’s PeopleSoft financial system.
- Compass serves both the University and Healthcare business units.
- Compass was implemented in September, 2009.
- Compass has more than 17,000 users.
Program Governance

**Executive Committee**
Provides the highest level of oversight for the project, governed by a charter, which details its function and scope. Provides approval to project change requests, budget requests, or policy/procedure recommendations submitted by the Steering Committee. Meets monthly to consider issues raised by the Steering Committee.

**Steering Committee**
Reviews the business needs of the Emory community and scope recommendations from the Project Leadership Team ensure alignment of the two are achieved to the highest degree possible. Serves as a liaison between the user community and the project team. Makes recommendations to the Executive Committee, the project team and the user community to improve the functionality of the system.

**Project Leadership Team**
Composed of functional and technical subject matter experts from the Emory community and supported by consulting partners. Makes operational decisions, defines the optimal cross-functional system design, and recommends scope and process changes for Steering Committee consideration. Ensures the expressed business needs of the users are considered.

**Work Stream Leads**
The Work Stream Leads drive the overall design, testing, and implementation of new Compass Upgrade functionality. They provide input on business decisions and processes that affect the design of the system and address the implications of business changes across the University and Healthcare organizations.
Why Upgrade Now?

Provide continuous operational improvements to the University and Healthcare communities.

Optimize our investment in the system and take advantage of improved PeopleSoft functionality.

Pursue opportunities to reduce our cost of ownership through a reduction of customizations.

Try to provide more intuitive user interactions and expand functionality to better support business needs.

Evaluate opportunities for process improvements.
Program Guiding Principles

1. Ship, collaboration
2. Functionality
3. Enterprise (University)
4. Be transparent
5. And unintended
6. Constituents and
7. Nality, safeguard

18-Jun-15
High-Level Roadmap

Phase I: Fit/Gap
December 2014-January 2015
• Compare features and functions with user needs.
• Identify customizations for removal and retention.
• Deliver Fit/Gap document with recommended solutions per business area.
• Deliver executive summary Fit/Gap document for all business areas.

✓ Received Board of Trustee (Finance Committee) approval 3/26

Phase II: Design/Configure/Build
January 2015-February 2016
• Design and configure for future state changes.
• Develop and unit test.
• Configure future state security.

Phase III: Test
April 2015-September 2016
• Prepare and execute test scripts.
• Document and follow detailed issue resolution strategy.

Phase IV: Go-Live & Training
May 2016-October 2016
• Rollout upgrade and train users.

Phase V: Stabilization
October 2016-February 2017
• Roll out additional enhancements and updates.
• Provide continuous user support.

Continuous Communication and Engagement
Timeline subject to change
What Does this Mean to Me?

**Now**
- Pay attention to communications (i.e., newsletters, etc.)

**Near Term**
- Be diligent about preparing for the change

**Future**
- Screens will be different. 9.2 has a lot of user benefits - which means it is different!
Stay Connected

upgrade.compass.emory.edu

- Launched May 11, 2015
- Keep current with the latest news & information
- See listening tour item updates
- Look for training information in the coming months

What the Portal will be

Compass Insight newsletter (2nd edition - May 11, 2015)

Send emails to
compassupgrade@emory.edu
For any questions, comments, concerns
Accounts Payable

Business Case Review and Project Scope Methodology
Payment Request - Overview

- Emory currently has a custom solution to handle Payment Requests for non PO related items, such as Honorariums, Speaker Fee, etc, which involves changes to the delivered voucher pages and the use of a 3rd party product called SmartWorkflow.

There are many calls into AP for assistance.
Difficult to find status or payment information

Listening Tour Requests
Make it Easier
Make it User Friendly
Include Enhancements
Implement the new 9.2 Payment Request functionality

- Stepped Approach Guides Users
- Includes Pages to Monitor Request through processing and Payment

**Emory Enhancements to 9.2 Payment Request**

1. Non-Employee transactions (Guest and Student Reimbursements)
2. Wire request capability
3. Handling of Foreign Nationals
4. Ability to add a payment message
5. Ability to set payment handling (such as hold for pick-up)
6. Display of Voucher ID and Payment Status
7. Enhance security to allow for managers to see requests within their area.
• In today’s current system, changes to **Supplier (Vendor) Names** have no specific tracking mechanism, as for date of the change or who made the change. Additionally, there is no way to track **historical** changes.

• There’s no other way to enter a future name change without the use of this new feature; instead, AP must manually note the change and remember to return to the system on the effective date to make the change manually.
PeopleSoft 9.2 includes a new process which tracks the history of supplier name changes.

Fields tracked include:
Supplier Short Name,
Supplier Name 1,
Supplier Name 2

Emory needs this information for both audit and issue research purposes.

Vendor names may change over time, either due to errors which require correction or just due to the vendor changing the name of their company.

Emory should turn this new feature on, via configuration, as part of the 9.2 upgrade, and provide training.
Vendor Validations (Financial Sanctions/SAM) - Overview

Federal regulation from the Office of Foreign Assets Control (OFAC) requires that suppliers be validated against a Specially Designated Nationals (SDN) list prior to payment.

Emory would like to implement the PeopleSoft delivered **Financial Sanctions Validation** functionality to perform this check when setting up new suppliers, as well as when vouchering invoices. Use of this functionality will flag a vendor that is on the sanctions list, and will hold up transactions for review until they can be fully vetted.

The Federal government also requires validation of vendors receiving Federal Funds, such as those on grants or research which are funded by the US Government. The US Federal Government General Services Administration (GSA) developed software called **System for Award Management (SAM)** which maintains a list of federally registered vendors/contractors and their status with the federal government. This validation needs to be automated, and is provided in PeopleSoft 9.2.
Vendor Validations (Financial Sanctions/SAM) - Recommendation

- Implement the delivered **PeopleSoft Financial Sanctions** at the Installation Level, which will allow for sanction validations to be done on various transactions within PeopleSoft.

- Emory should use Visual Compliance as the validation source using web messaging to provide the most comprehensive real-time check available. This is delivered functionality.

- Implement, Automated SAM Validation for checking certifications of vendors which may be paid using federal funds.

- Alternatively, Visual Compliance could provide a file for loading into PeopleSoft, but the web method is recommended as it provides checks against the latest updates and is more cost effective.
Currently, Emory is using J.P. Morgan as their procurement card supplier and is using J.P. Morgan’s **PaymentNet** as their procurement card reconciliation system. This system is external, has a completely different interface than other systems in use at Emory and requires a **separate login and password**.

**J.P. Morgan removes older, unreconciled items from the system, making it extremely difficult and resource intensive for Emory to gain access to such transactions. Emory wants these transactions to be available until such time they are reconciled.**

**Users frequently forget ID and Passwords, which results in a lot of administrative effort to assist them with setting up account, password resets, and general instruction.**
• Implementing the Procurement Card functionality within PeopleSoft will eliminate the need to have a separate ID and sign-on, as PeopleSoft users can use *single sign-on*.

• The Procurement Card functionality within PeopleSoft will retain all of the transactions, regardless of how old or if they have/have not been reconciled. Existing accounting rules are enforced and daily manual interfaces are eliminated. Should help remove barriers to reconciliation, resulting in higher compliance while reducing errors.
Additional Approved Business Cases – Accounts Payable

- **Overview** and **Recommendations** are available for review.
- Check the website: [upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)

<table>
<thead>
<tr>
<th>Accounts Payable Business Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Printing and Single Pay Card</td>
</tr>
<tr>
<td>Vendor Attachments</td>
</tr>
<tr>
<td>Supplier Audit</td>
</tr>
<tr>
<td>Supplier Hierarchy</td>
</tr>
<tr>
<td>AP Operational Dashboard</td>
</tr>
</tbody>
</table>
Travel & Expense

Business Case Review and Project Scope Methodology
Expense Reporting User Interface - Overview

Emory has too many complex customizations and we can’t maintain them or upgrade them!

There are too many clicks or ‘drill downs’ required to populate an expense transaction.
31 Listening Tour Items specifically about Expense Entry.

**Dislikes**
• Too many clicks to get to the accounting detail.
• Not enough location information – line level location if possible
• Simplify populating attendees on expense report.

**Likes**
• Being able to do a split on wallet or other expenses for alcohol or other reasons.
• Ability to attach receipts to travel expense reports.
• Not having to store corporate card receipts for 7 years
• Insight into the status of Expense reports throughout the process
Expense Reporting User Interface - Recommendations

- Adopt the redesigned and streamlined Expense Entry screen delivered in 9.2, which addresses many prior concerns.
- Create a new custom Expense Report Summary that will incorporate the informational customizations to the Entry screen along with the Accounting Summary for the Expense Report.
- Rollout the Mobile Expenses application.
## Expense Report User Interface

<table>
<thead>
<tr>
<th>People</th>
<th>Module Support</th>
<th>Impacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Administration</td>
<td></td>
<td>Minimal support required because of moving to delivered functionality.</td>
</tr>
<tr>
<td>Campus Users</td>
<td></td>
<td>Greatly improved and streamlined User Interface that reduces the drill down and clicks required to complete an Expense report.</td>
</tr>
<tr>
<td>Process</td>
<td>Module Support</td>
<td>Impacts</td>
</tr>
<tr>
<td>Central Administration</td>
<td></td>
<td>Greatly reduced support requirements because of using delivered functionality without customizations.</td>
</tr>
<tr>
<td>Campus Users</td>
<td></td>
<td>The delivered 9.2 Expense Entry screen is much more user-friendly than the existing screen in 9.0.</td>
</tr>
<tr>
<td>System</td>
<td>Module Support</td>
<td>Impacts</td>
</tr>
<tr>
<td>Central Administration</td>
<td></td>
<td>Future upgrades for patches and enhanced functionality could be implemented with minimal retrofit and testing effort.</td>
</tr>
<tr>
<td>Campus Users</td>
<td></td>
<td>New features and functionality could be delivered easily with future PUMs.</td>
</tr>
<tr>
<td>Training</td>
<td>Module Support</td>
<td>Impacts</td>
</tr>
<tr>
<td>Central Administration</td>
<td></td>
<td>Requires significant re-training effort for users of the Expenses module.</td>
</tr>
<tr>
<td>Campus Users</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Expense Report User Interface -

Current Interface: A lot of modifications/customizations that we can see, and many more we cannot
New, more intuitive, Expense Report entry

Expense Entry Interface

Create Expense Report

Kenneth Schumacher

*Business Purpose: General Travel and Expense

*Report Description: Consulting and product demo

Default Location: WASHINGTON, District of Columbia

Attachments

Expenses

*Date: 11/10/2014

*Expense Type: Automobile Rental

*Billing Type: Internal

*Location: Boston, Massachusetts

*Merchant: Preferred

Accounting Details

Chartfields

Description: Rental car during Conference

*Payment Type: Visa

*Amount: 200.00 USD

*Currency: USD

*Exchange Rate: 1.0000000

Reimbursement Amt: 200.00 USD

Totals (1 Line) 200.00 USD

18-Jun-15
Expense Entry Interface

Meal Attendees

Expense Entry Interface

*Business Purpose: Team Building Session
*Report Description: Team Building Dinner

Expenses

*Date: 11/04/14
*Expense Type: Dinner
*Description: Team Dinner - Food
*Payment Type: Visa
*Amount: 350.00 USD

*Location: Atlanta, Georgia
*Billing Type: Internal
*Attendees: Kenneth Schumacher

Attendees

Kenneth Schumacher
Emory Upgrade Consultant

Attendees are required for the Dinner expense on line 1. Please list the attendees associated with this expense.
**Expense Entry Interface**

*Itemize Hotel Bill*

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Location</th>
<th>Merchant</th>
<th>Nights</th>
<th>Rate</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/30/2014</td>
<td>150.00</td>
<td>Marriott Hotel</td>
<td>Preferred</td>
<td>2</td>
<td>1.0</td>
<td>55000</td>
</tr>
</tbody>
</table>

**Create Expense Report**

*Itemize Hotel Bill*

**General Hotel Bill Information**

- Transaction Date: 10/30/2014
- Payment Type: Check
- Billing Type: Internal
- Number of Nights: 2
- Amount Spent: 150.00
- Currency: USD
- Exchange Rate: 1.00000000

**Your Hotel Bill**

- Total Bill: 150.00 USD
- Remaining: 150.00 USD

**Charges Incurred on This Bill**

- Room Charge
- Parking
- Room Service
- Laundry
- Telephone/Internet
- Misc Charges
Expense Entry Interface

Receipt Split

Expense Report

Receipt Detail for Expense Lunch - Total 32 USD

Date | Type    | Amount
---   |---------|--------
11/04/2014 | Gasoline Charges | 22.00 USD
11/04/2014 | Lunch        | 10.00 USD

Current Total: 32.00 USD
Balance: 0.00 USD
Expense Entry Interface

Mobile Expenses Application

-- Diagram --

- Add Quick Expense
- My Wallet
- Create Expense Report
- Expense History

- Unsubmitted Reports
- Reports Pending Approval or Payment
- Reports To Approve

-- Notices --

Expense Report Submission Timelines
Effective immediately, any expense transaction submit

Global Preferred Hotel Program
To comply with our company policy, you should use the

Compliance with Travel Policy
The Global Travel team, along with the support of Exec

My Wallet by Type (USD):
- 261.00 - Conference/Meeting
- 202.00 - Air Travel
- 90.63 - Subscriptions
- 80.65 - Meals and Incidental Ex
- 76.99 - Supplies
- 66.66 - Dinner

My Expense Report by Status (USD):
- 4,055.63
- 689.89

PENDING
Submitted
Expense Entry Interface

Mobile Expenses Application – Create an Expense Report

Description: Demo of the Mobile Expense App
Business Purpose: General Travel and Expense
Comment: Screen as see in desktop browser
Expense Entry Interface

Mobile Expense Application – Add a line

Expense Line

- Date: 2014-11-20
- Expense Type: Automobile Rental
- Payment Type: Visa
- Expense Billing Code: Internal
- Transaction Amount: 20.00
- Currency: US Dollar
- Use Preferred Merchants: No
- Merchant: Enterprise
- Expense Location: LV
- Description: Rental car during conference
- Non-Preferred Merchant Comment: Enterprise was less expensive
Mass Proxy Maintenance - Overview

- Individuals have the ability to submit, or view, Expense Reports on behalf of others as a proxy.

- 70% of the Expense Reports submitted in FY 2014 were submitted by a proxy.

- We need a relatively simple way to create and maintain proxies.

Table A: FY 2014 View of Expense Reports submitted

<table>
<thead>
<tr>
<th>Submitted For</th>
<th>Reports</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted for Other</td>
<td>47123</td>
<td>70%</td>
</tr>
<tr>
<td>Submitted for Self</td>
<td>20530</td>
<td>30%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>67653</td>
<td>100%</td>
</tr>
</tbody>
</table>
“We recommend that we enhance and improve our current Mass Proxy maintenance process to better meet Emory’s business needs while maintaining controls and security checks for the proper delegation of proxy authority.”
Mass Proxy Maintenance Page
Expense Report Summary - Overview

• Emory Customization were made to the PeopleSoft 9.0 Expense Report Accounting summary and show the Expense line items along with the accounting information.

• There are multiple customizations to the Expense Report Entry screen that have been added and do not exist in 9.2 Expenses. These customizations include the Begin/End Dates, ID Type and the Corporate Card holder message at the top of the Expense sheet.

Key Information Requested

• Program or Event chartfields,
• Sheet Header information that could be used to help identify the trip being reviewed.
• Begin/End date fields are currently stored in custom fields that are entered by the submitter of the Expense report. This can lead to incorrect keying and there is also existing code within the Expense Report Entry screen that is checking the Transaction dates against the Being/End Date, which is unnecessarily causing errors to occur.
Expense Report Summary - Recommendation

• Develop a new Expense Report Summary page that will incorporate all of the customized data points that have been added to the Expense Entry screen as well as show the accounting detail for the expense transactions on the Expense Report.

• Develop a new XML Publisher (XMLP) report based on the existing ‘Print Report with Barcode’ and add all of the accounting data. The full string of chartfields should be shown along with the Expense Type, Merchant, Amount, Transaction Date and additional comments made at the expense line level.
Additional Approved Business Cases – Expenses

- **Overview** and **Recommendations** are available for review.
- Check the website: [upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Employee Load and Validation</td>
</tr>
<tr>
<td>Corporate Card Load</td>
</tr>
<tr>
<td>Year End Processing</td>
</tr>
</tbody>
</table>
Thank you for attending this Compass Outreach Session!

Check the **website** for information on future Compass Outreach Sessions

[upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)
Questions
Jay Flanagan
Manager, Enterprise Email & Messaging

Messaging Team Update
365 Updates

• New VDT for EHC on target for completion by Sept. 1, 2015

• Moves to begin towards the end of September
  – EHC, SOM, SON, Yerkes and any stragglers that somehow got missed

• Archive Moves Completed
  – Global archiving end of calendar year or early next year
LDS

- LDS now in production
- We are ready to work with you to move your application
- Contact LDS-Migration@emory.edu
- 9 have completed the move to LDS Prod, 53 are in progress and 8 have not started
- https://wiki.service.emory.edu/pages/viewpage.action?pageId=90937569
- We have been reaching out to those groups who have not started their moves
- Complete all moves by Sept. 1, 2015
PW Expiration / Reset

- Required expiration coming this fall
- Ongoing password reset every 365 days
- PCI users every 90 days
- No exceptions
- Communication ongoing
- Spread Sheet and General Data on Wiki
  - [https://wiki.service.emory.edu/display/infrastructure/Active+Directory+-+Password+Change+Statistics](https://wiki.service.emory.edu/display/infrastructure/Active+Directory+-+Password+Change+Statistics)
Do you have lots of unread email in your mailbox? Messages that you like or need to get, but don’t necessarily need or have time to read? If you are like me, you have a lot of these types of messages. To help with these types of messages, Microsoft is introducing a new service in Office 365 on or about June 15th called CLUTTER.

Clutter is similar to how Outlook/Hotmail and Gmail create focused / primary Inboxes - and moves other less important email to a secondary folder/view. It lets you prioritize your focus on the more important emails.

What is Clutter:  https://emory.service-now.com/ess/kb_view.do?sysparm_article=KB04915

How to enable/disable clutter:  https://emory.service-now.com/ess/kb_view.do?sysparm_article=KB04917
“Do it. Reply all.”
Questions?
Thank you for coming!