IT Briefing Agenda

- Meet Me Conferencing
- Compass Upgrade
- Messaging Team Updates
- Security Update

- Mike Politinsky
- Dave Miller
- Jay Flanagan
- Derek Spransy
Mike Politinsky
Manager, Network Tier 2, Enterprise Services

Meet Me Conferencing Changes
Why are we changing?

- The Meet Me service will be replaced with Avaya Aura Conferencing.
- This service enhancement will address an aging platform plus add collaboration features including audio, video, desktop sharing, document sharing and messaging.
How will the service change?

• Service enhancements include Audio/Video conferencing, web collaboration.
• Conference bridges will require a moderator in order to utilize features.
• The service leverages two key components – The Collaboration Agent and the Library
• A Meeting Report can be generated to include: minutes, exchanged messages, library files and whiteboard or screenshots.
The Collaboration Agent provides tools for managing and participating in conferences and sharing information. In the Web Collaboration workspace, participants can share content such as documents, virtual whiteboards and applications. Participants can send messages, annotate shared content and record minutes.
Collaboration Agent Controls

Collaboration Agent Screen – Basic Controls

- The basic controls are annotated below

- Start Sharing
- Invitation Details, Touch-tone Commands
- Reports, Recordings, Statics, Logs

- Default Settings
- Future Conferences

- End Conference

- Participants:
  - Massey, Joe

- Right-Click for Participant Controls

- ~Massey-Main & Cov
  - Identify my phor
  - Mute
  - Pause video
  - Presenter
  - Moderator
  - Raise Hand
  - Drop from Call
Moderator Configured Settings

Default Settings

- **Fast Start**
  Start my conference when the first participant dials in

- **Continuation**
  Continue my conference after the moderator leaves

- **Entry Tone**
  Play a tone when someone joins or leaves my conference

- **Video**
  Allow video on my conference

- **Auto Record**
  Start recording at the beginning of my conference

- **Presentation Mode**
  Allow participants to join as presenters and start web collaboration
The Library Feature

- The **Library** feature allows anyone with a system account to store presentation materials in advance and retrieve them in seconds when “given the floor.” This way all participants can collaborate by viewing these presentations, as well as making notes on any whiteboard.

- From Collaboration Agent anyone can view:
  - Who is on the call, Who is currently speaking, Who is taking part in Web Collaboration, or Who is presenting

- Conference moderators can:
  - Record a conference, mute participants, edit meeting notes, and create and distribute reports from meeting notes.
What will I need to do?

• Your Conference Bridge telephone number will change to 404-727-9999 (79999).

• You will get a unique moderator and participant code for the bridge associated with your telephone extension.

• Change open meetings to your new conference access information when you receive your email from LITS.
When will this happen?

• It is expected that the service will complete testing in September for a planned mid-October deployment.
• The current Meet Me Conference bridges will be retired roughly a month later.
• The enhanced service will be priced under $20 per month.
Questions
Compass Outreach Sessions

Topics:
Focus topics for this quarter are the SmartKey, General Ledger, and Reporting modules. Focus topics will change as the project progresses.

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 (we are in the process of figuring out the HOW).

Audience:
Sessions are scheduled across campus for convenience, but each session is open to the entire Emory community.
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.

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
October 2016-January 2017

- Solidifying Go-Live dates Nov/Dec 2015
- 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

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

✓ 20-Aug-15

Emory Libraries & Information Technology
We’ll Be Back In Your Neighborhood...

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

- Business Case

Inventory:
- SmartKey
- General Ledger
- Reporting
  - Program Guiding Principles
  - What Do I Need to Do Now?
SmartKey is a “short-cut” tool to provide a shorter entry key than the full 57 digit ChartField string.

SmartKey is not a PeopleSoft tool. It is a 3rd party interface that sits on top of PeopleSoft.

SmartKey is costly based on fees incurred and prevents ability to apply updates/patches.
SmartKey Replacement Recommendation

Smart.Logical.Simple

Leverage the PeopleSoft 9.2 delivered functionality.

Existing 10-digit SmartKey numbers will remain the same when converted to SpeedTypes.

Comply with user community request to have a numbering convention that is logical and simple.

Engage the user community for testing and feedback.
Balance is Necessary for Success

User Requests
- Make the “SmartKey” number “smart” and intuitive based on chartfield details
- Keep the current SmartKey number used
- Need to See the SpeedType Used (in report details and inquiry screens if used in the transaction)

System Needs
- SpeedType is not used in all transactions
- Delivered Functionality = Unlocked Retained Values
- SpeedType = Entry Code Only

Manage Efficiency & Cost of Ownership
# PeopleSoft Chart of Accounts – Current Structure

## All Transactions

<table>
<thead>
<tr>
<th>Business Unit (5)</th>
<th>Operating Unit (5)</th>
<th>Dept ID (6)</th>
<th>Fund (4)</th>
<th>Class (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Transactions</td>
<td></td>
<td></td>
<td></td>
<td>NACUBO Code for Functional Classification Reporting</td>
</tr>
</tbody>
</table>

## Projects Only

<table>
<thead>
<tr>
<th>Business Unit (5)</th>
<th>Project Costing Business Unit (5)</th>
<th>Project (8)</th>
<th>Activity (5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects Only</td>
<td>Identifies type of Project: Sponsored, CIP, Non-Sponsored</td>
<td>Represents sponsored projects or select non-sponsored activities (Auto numbered 8-digit value)</td>
<td>System requires use of the activity ChartField with all Projects</td>
</tr>
</tbody>
</table>

## Optional

<table>
<thead>
<tr>
<th>Program (5)</th>
<th>Event (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the activity for which I need to capture financial information?</td>
<td>Additional ChartField to track financial data</td>
</tr>
</tbody>
</table>

**SMARTKEY** is a third-party vendor tool used for data entry of ChartFields and interfaces. It will populate all these fields for end users.

When a transaction using SmartKey is processed, the SmartKey number entered is embedded into ChartField2 (Entry Code) automatically.

For Emory, the “smartest” SmartKey would be 57 characters long.

Date: 20-Aug-15
Community Outreach – SpeedType Interactive Labs

What?
Hands-on labs to allow SmartKey users to try a variety of SpeedType options and share their preferences.

When?
Twelve (12) Sessions: May 12, June 3, June 11, and June 17

Why?
Provide an opportunity for Compass users to get a feel for various SpeedType configurations within the new interface and vote on their preference.

Who Attended?
189 Compass users representing 24 division across Emory University and Healthcare.
### Interactive Lab Participants by Division – (June 3rd, 11th, 17th)

<table>
<thead>
<tr>
<th>Division</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Services</td>
<td>1</td>
</tr>
<tr>
<td>DAR</td>
<td>1</td>
</tr>
<tr>
<td>President’s Office</td>
<td>1</td>
</tr>
<tr>
<td>School Of Law</td>
<td>1</td>
</tr>
<tr>
<td>Emory Healthcare Inc.</td>
<td>1</td>
</tr>
<tr>
<td>Office of General Counsel</td>
<td>1</td>
</tr>
<tr>
<td>Communications and Marketing</td>
<td>1</td>
</tr>
<tr>
<td>Graduate School</td>
<td>2</td>
</tr>
<tr>
<td>Emory Temporary Services</td>
<td>2</td>
</tr>
<tr>
<td>Human Resources</td>
<td>2</td>
</tr>
<tr>
<td>Candler School Of Theology</td>
<td>2</td>
</tr>
<tr>
<td>Executive Vice President</td>
<td>4</td>
</tr>
<tr>
<td>LITS: Library and IT Services</td>
<td>4</td>
</tr>
<tr>
<td>EVP Provost Academic Affairs</td>
<td>4</td>
</tr>
<tr>
<td>Exec. V.P. for Health Affairs</td>
<td>4</td>
</tr>
<tr>
<td>Yerkes National Primate Research</td>
<td>4</td>
</tr>
<tr>
<td>Campus Life Activities</td>
<td>6</td>
</tr>
<tr>
<td>Office of Development &amp; Alumni Relations</td>
<td>6</td>
</tr>
<tr>
<td>School Of Public Health</td>
<td>8</td>
</tr>
<tr>
<td>Research Administration</td>
<td>13</td>
</tr>
<tr>
<td>Emory College</td>
<td>20</td>
</tr>
<tr>
<td>School Of Nursing</td>
<td>21</td>
</tr>
<tr>
<td>Vice President For Finance</td>
<td>25</td>
</tr>
<tr>
<td>School Of Medicine</td>
<td>43</td>
</tr>
</tbody>
</table>

### Key Notes:
1. SOM - 24.3% of participants
2. VP Finance - 14.1% participants
3. SON - 11.9% of participants
4. ECAS - 11.3% of participants
5. Research Admin - 7.3% of participants
**SpeedType Lab Results**

**Ease**
Which SpeedType test did you find easiest to complete from a data entry standpoint?
Answered: 177  Skipped: 0

- Yellow: 59%
- Green: 34%
- Red: 7%

**Overall Preference**
Which SpeedType test did you prefer?
Answered: 177  Skipped: 0

- Yellow: 51%
- Green: 35%
- Red: 14%

**Logic**
If you had a preference, which SpeedType logic would you choose?
Answered: 177  Skipped: 0

- Yellow: 51%
- Green: 34%
- Red: 15%

**Legend:**
- **234 1987656** - Steering Committee Selection
- **234 D 987656** - User Selection

*Currently investigating the use of a 6-digit dept ID*

---

The Steering Committee voted unanimously in favor of the “user’s choice” even though they preferred a different option.

**Department**  **Fund Code**  **Auto-number**
“Less zero counting while inputting”

“It was all numbers and you didn’t have to switch to letters.”

“I like the fact that I can identify the SpeedType by the fund code just by looking at SpeedType. I will know that this fund code is an endowment, unrestricted, or sponsored fund code.”

“I am used to completing a 21 digit Chartfield string, so knowing the fund type helps me know what type of funds I am working with.”

“The letter in the middle separated the numbers and made it easier to read.”

“The letter is a natural break and a quick/readily identifiable code for kind of SpeedType number, e.g., BOP vs GRANT.”

“For reporting purposes the letter would stand out to allow for ease of identifying fund type.”

“It made me think more about the type of transaction I was doing based on the alpha-numeric. Also, I believe this will prove beneficial for identifying the kind of project at a glance.”

“It was the fastest”

“All numeric and because three digits for the department doesn’t tell you a whole lot…”

“Just seemed to flow better with the four digit department number first. With leaving out fund code, which can change after setup, this would eliminate the risk of having to change the SpeedType based on a fund code setup error.”

“I feel that I would get fewer drop down options with four digits.”
Stay Tuned for More Information about SpeedType Changes . . .
SpeedType ‘Type Ahead’ Example

As you type, the system will narrow the results based on the digits entered.
SpeedType: The Burning Questions . . .

- Do I get to keep my existing SmartKeys?
- What if I want to change my existing SmartKeys to the new SpeedType numbering schema?
- Will there be any opportunities for me to see the new Compass interface and SpeedType before we Go Live?
- How will the SpeedType transition impact reporting?
General Ledger

Business Case Review and Project Scope Methodology
PeopleSoft Chart of Accounts – Current Structure

- **Transaction**
  - Business Unit (5)
  - Operating Unit (5)
  - Dept ID (6)
  - Fund (4)
  - Class (5) NACUBO Code for Functional Classification Reporting
  - Account (5)

- **Projects Only**
  - Project Costing Business Unit (5)
    - Identifies type of Project: Sponsored, CIP, Non-Sponsored
  - Project (8)
    - Represents sponsored projects or select non-sponsored activities (Auto numbered 8-digit value)
  - Activity (5)
    - System requires use of the activity ChartField with all Projects

- **Optional**
  - Program (5)
    - What is the activity for which I need to capture financial information?
  - Event (4)
    - Additional ChartField to track financial data

---

20-Aug-15
## Fund Code Fringe - Overview

**Business Need Gap:** Sometimes we do not know the fund code or it is incorrectly entered when the SmartKey is originated.

**The Result:** …

| Significant corrections (reclassification) to move all the expenditures to the updated fund (SmartKey). | Drives incorrect fringe calculations for payroll entries. | Until cleanup of journal entries, RSTs (Request for Salary Transfers), PO’s and other transactions are completed, reporting is negatively impacted. |
Use **Project Type** field to designate Federal or Non Federal grants at the individual project level

- *Project Type changes will trigger audit trail, that triggers necessary fringe calculation.*
- *Adjustments are automatically performed without user intervention.*
Existing Challenges that Require Re-Classification:

- Grant transactions that need to be reclassified due to fund code corrections, cost transfers, and cost sharing.

- Grant Out of Bounds Corrections: another type of correction entry that originates due to transactions attempting to charge a grant after the allowable project close window.

- Details of current reclassification or correction entries are currently lost due to summarization and are therefore not easily traceable in the data warehouse reporting.

Request:

Simplify the process to perform a bulk re-class that includes all of the necessary debits and credits.
We would like to create a new custom Journal application with the ability to move/re-class Journal entries (detailed data) from existing ChartFields to new ChartField strings. We have a lot of uncertainties to work out. We will provide updates on the progress of this in early Fall.

The tool would allow a User to:

• search for candidates to move/re-class using ChartFields or SpeedTypes
• select candidates to move/re-class
• enter the destination ChartField strings (either new ChartField
Emory has a significant number of external systems (30-40) that must send financial entries to the Compass/PeopleSoft General Ledger (GL).

The process to post these entries is called Journal Entry Engine (JEE).

There is an underlying assumption with the original JEE that all entries must post somewhere requiring massive clean-up effort.

There is a current need to remedy common issues that complicate the process to post these 3rd party entries at Month End Close processes.
Enhance the existing Journal Entry Engine customization. The process would remain the same on the front end but as invalid lines are detected during processing they would go through the following process:

An invalid Account value will be replaced with the Default Account (instead of the current method where a technical person corrects the file).

Blank Account values will be replaced with Default Accounts.

We are evaluating process improvements around test files prior to posting.
Unified Reporting
Business Case Review and Project Scope Methodology
Unified Reporting - Overview

As of January 2015:

- 16,000+ Private Queries
- ~2,700 Public Queries
- 600+ nVision Report formats
- 121 Custom Emory reports (non-nVision)

Comments from Listening Tour sessions, indicates user frustration in determining which query or report they should use to obtain the data and information that they need.
## Projected View - Unified Reporting

<table>
<thead>
<tr>
<th>Type</th>
<th>Impacted Population</th>
<th>Description</th>
<th>Current state to Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Query</td>
<td>All Users</td>
<td>Count is expected to drop by 50% due to cleanup, as training on other tools improves and as Public Queries are better cataloged</td>
<td>Reduce by 50%</td>
</tr>
<tr>
<td>Public Queries</td>
<td>All Users</td>
<td>Count is expected to drop by 50% due to cleanup, as training on other tools improves and as Public Queries are better cataloged</td>
<td>Reduce by 50%</td>
</tr>
<tr>
<td>nVision</td>
<td>Financial Reporting</td>
<td>End goal is to migrate Campus end users to EBI</td>
<td>Migrate Campus end users to EBI</td>
</tr>
<tr>
<td>SQR</td>
<td>LITS, Grants, &amp; Healthcare</td>
<td>Remain largely unchanged</td>
<td>No Change</td>
</tr>
<tr>
<td>Crystal Reports</td>
<td>Procure to Pay &amp; Billing</td>
<td>Replaced with <strong>BI Publisher</strong></td>
<td>Replaced with BI Publisher</td>
</tr>
<tr>
<td>EBI</td>
<td>All Users &amp; Executives</td>
<td>According to the <a href="#">Listening Tour feedback</a>, EBI has been well received and is becoming more of the <a href="#">preferred reporting tool</a> for Campus end users of financial data</td>
<td>Increase EBI Use</td>
</tr>
</tbody>
</table>
## Recommendations

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Clean-up</strong></td>
<td>or archive the queries/reports no longer used.</td>
</tr>
<tr>
<td>2. <strong>Document</strong></td>
<td>the functionality of remaining queries so users know which query to run and the expected results.</td>
</tr>
<tr>
<td>3. <strong>Retrofit</strong></td>
<td>the remaining queries/reports for new PeopleSoft functionality or structure changes.</td>
</tr>
<tr>
<td>4. <strong>Create</strong></td>
<td>new queries/reports that are needed to support the module business cases.</td>
</tr>
</tbody>
</table>
Going Forward….

- Ongoing clean-up, documentation and retrofitting of existing queries/reports
- Create design documents for approved new reports

*Look for communications regarding….*
- Query Manager access
- Clean up of private queries

---

Timeline subject to change

Any additional “new” reports requested after the Design/Build phases will go through an approval process.

---

Timeline:
- Nov 2014: Clean Up
- Aug 2015: Document current reports/queries
- Jun 2016: Retrofit current reports
- Q1-Q2 Fiscal 2017: Create new reports

Process:
- User Acceptance Testing
- Go-Live & Stabilization
- Continued Maintenance & Development

Fiscal Year

**Timeline:**
- Nov 2014: Clean Up
- Aug 2015: Document current reports/queries
- Jun 2016: Retrofit current reports
- Q1-Q2 Fiscal 2017: Create new reports

**Process:**
- User Acceptance Testing
- Go-Live & Stabilization
- Continued Maintenance & Development

---

*Timeline subject to change*
What About Training?

Step 1: Idea Gathering
Step 2: "Wish List" Design Concepts
Step 3: "Reality" Detailed Engineering Plan
Step 4: Build/Construct
Step 5: Inspection
Step 6: Final Walkthrough

We are here

Listen Tours
Business Case Approval
Design-Business Processes & People Soft Functionality
Development
User Acceptance Testing
Training
Training Strategy & Approach

On-Demand “How-To” Modules (self-paced web training)

Instructor-led Training (classroom training)

Virtual Instructor-led Training (webinars)

Pre-Learning (interactive labs)

Quick Reference Cards

Trainer Readiness

Managed & tracked by Emory’s Learning Management System (ELMS)

Leverage Communications Council to localize training content (customize scenarios)

Go-Live Desk-side Support & Finance Client Support Center

End User

Quick Reference Cards

High-Touch

Low-Touch
Be in the Know....

**ATTEND.**

**VISIT.**

**YAMMER.**

**READ.**

**REACH OUT.**

**Compass Outreach Sessions**
- Topics **change quarterly**
- Sessions set-up across Campus for convenience
- Register on the Compass upgrade website
- Win prizes

**upgrade.compass.emory.edu**
- Review project background and team members
- Keep current with the latest news & see listening tour updates
- Catch-up and **review presentations & recordings of past sessions**
- Register for training information in the coming months
- Emory is using Yammer to share, discuss projects, and get work done faster
- Keep current with the latest news & talk

**Compass Insight** newsletter (bi-monthly) to the **Compass Users ListServ**

Contact **compassupgrade@emory.edu** to get on the ListServ

Send emails to **compassupgrade@emory.edu**
For any questions, comments, concerns
Website Navigation

Project Overview

Project Workstreams

Communications Toolkit

Stay Current with the Latest News & Events

Register for Events & Review Past Recordings

Register for Events

Compass Upgrade Timeline

Latest News

Calendar of Upcoming Events

Summer 2015 Compass Outreach Sessions

Accounts Payable and Travel & Expenses

Come join Compass Leadership team members for an overview of the approved business cases and the anticipated changes to the Accounts Payable and Travel & Expenses modules.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 25</td>
<td>12:00pm-12:30pm</td>
<td>Office Bldg.</td>
<td>Compass Outreach Sessions</td>
<td>Register/Enroll: Click on the Compass Outreach Session to enter the EMS, and search for the Compass Outreach course (CRN:2603345)</td>
</tr>
</tbody>
</table>
Program Guiding Principles

- Full evaluation
- Represent the enterprise (University & Health) 
- Understand the business need and unintended consequences
- Consider impact to constituents and related budgets
- Encourage improved functionality, safeguarding valued existing solutions
- Promote shared ownership, collaboration, and communication
Thank you for attending this Compass Outreach Session!

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

[upgrade.compass.emory.edu]
Messaging Team Updates

Jay Flanagan
Sr. Manager, Messaging Team

Messaging Team Updates
"I didn't do my homework because I forgot my user name and password."
LDS

• LDS now in production
• We are ready to work with you to move your application
• Contact LDS-Migration@emory.edu
• 36 have completed the move to LDS Prod, 28 are in progress and 2 have not started
  – Of those 28 in progress, 11 are completed, but are being finalized
• https://wiki.service.emory.edu/pages/viewpage.action?pageId=90937569
• We have been reaching out to those groups who are in process
• Complete all moves by Sept. 1, 2015
PW Expiration / Reset

• Required expiration coming this fall
• Communication ongoing
• Spread Sheet available
• 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)
  – Over 12,000+ accounts have been changed
  – Still over 25,300+ accounts need to be changed
YOU’LL HAVE TO DRIVE ME TO SCHOOL, MOM - I FORGOT THE SCHOOL BUS PASSWORD.
Questions?
PGP Decommission

- The existing PGP full disk encryption service is being retired.
- A lot of progress has been made but there are roughly 430 systems to go.
- PGP support will be extended for a smaller number of licenses.
- New target date for full decom will be the end of December. Please continue to migrate as quickly as possible to MBAM!
- Your IT Director should have a list of remaining PGP systems
MBAM Adoption Rate

![Graph showing MBAM adoption rate with two lines representing PGP and BitLocker. The x-axis represents months from May to July, and the y-axis represents the adoption rate ranging from 0 to 1800. The graph illustrates the adoption trends for each month.]
Outbound DNS Filtering

• Outbound DNS queries from non-Emory DNS servers are now being blocked at the border.
• No major impacts reported from the change.
• Please be aware of this as a troubleshooting step going forward when users aren’t able to resolve domains
• Knowledgebase articles:
  – KB04982 - Windows
    KB04983 - MacOS
    KB04984 - iOS
    KB04985 - Android
Questions
Thank you for coming!