EMORY
LIBRARIES &
INFORMATION
TECHNOLOGY

IT Briefing

August 20, 2015

North Decatur Building

4th Floor Auditorium

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.

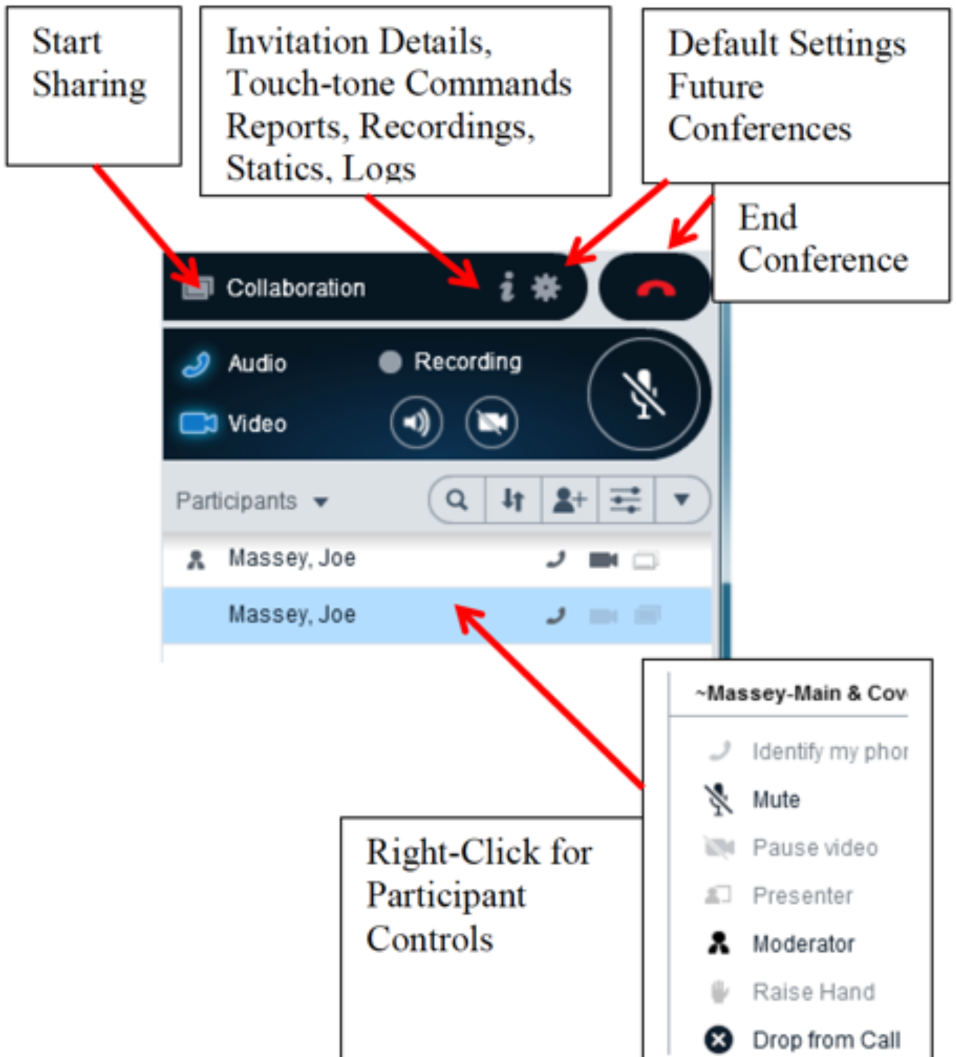
The Collaboration Agent

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



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.

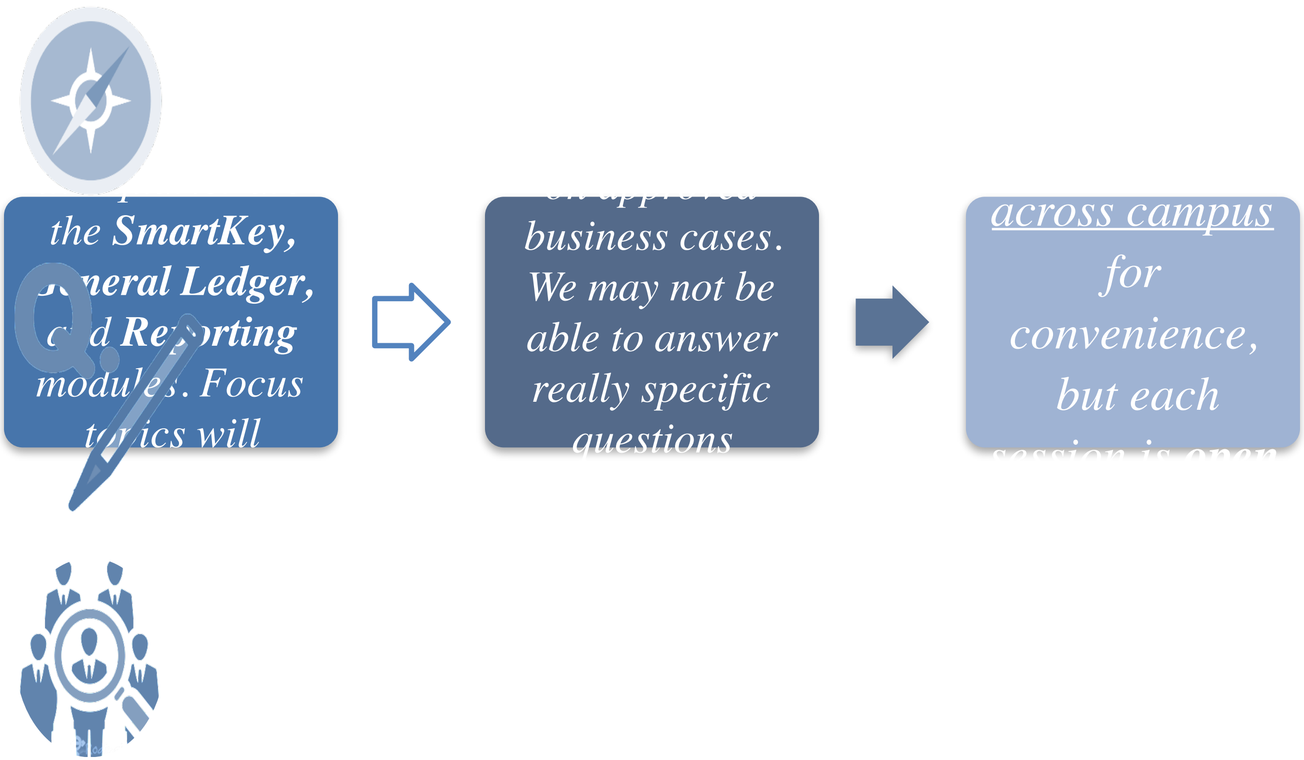
Questions

Dave Miller

Project Managers, Project Management Office

Library Service Center Update

Compass Outreach Sessions



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

PROJECT START

We are here

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: Stabilizati

October 2016-Febru 2017

- Roll out additional enhancement updates.
- Provide continuous user support

Continuous Communication and Engagement

Timeline subject to change

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

- Business Case

  Inventory:

  - SmartKey
  - General Ledger
  - Reporting
- Program Guiding Principles
- What Do I Need to Do Now?

SmartKey Replacement Overview

- 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

community request to have a numbering convention

user community for testing and

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
5+5+6+4+5+5=30

Business Unit (5)

Operating Unit (5)

Dept ID (6)

Fund (4)

Class (5)
NACUBO Code for Functional Classification Reporting

Account (5)

Projects Only
5+8+5=18

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
5+4=9

Program (5)
What is the activity for which I need to capture financial information?

Event (4)
Additional ChartField to track financial data

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 <u>transaction</u> 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.

Community Outreach – SpeedType Interactive Labs

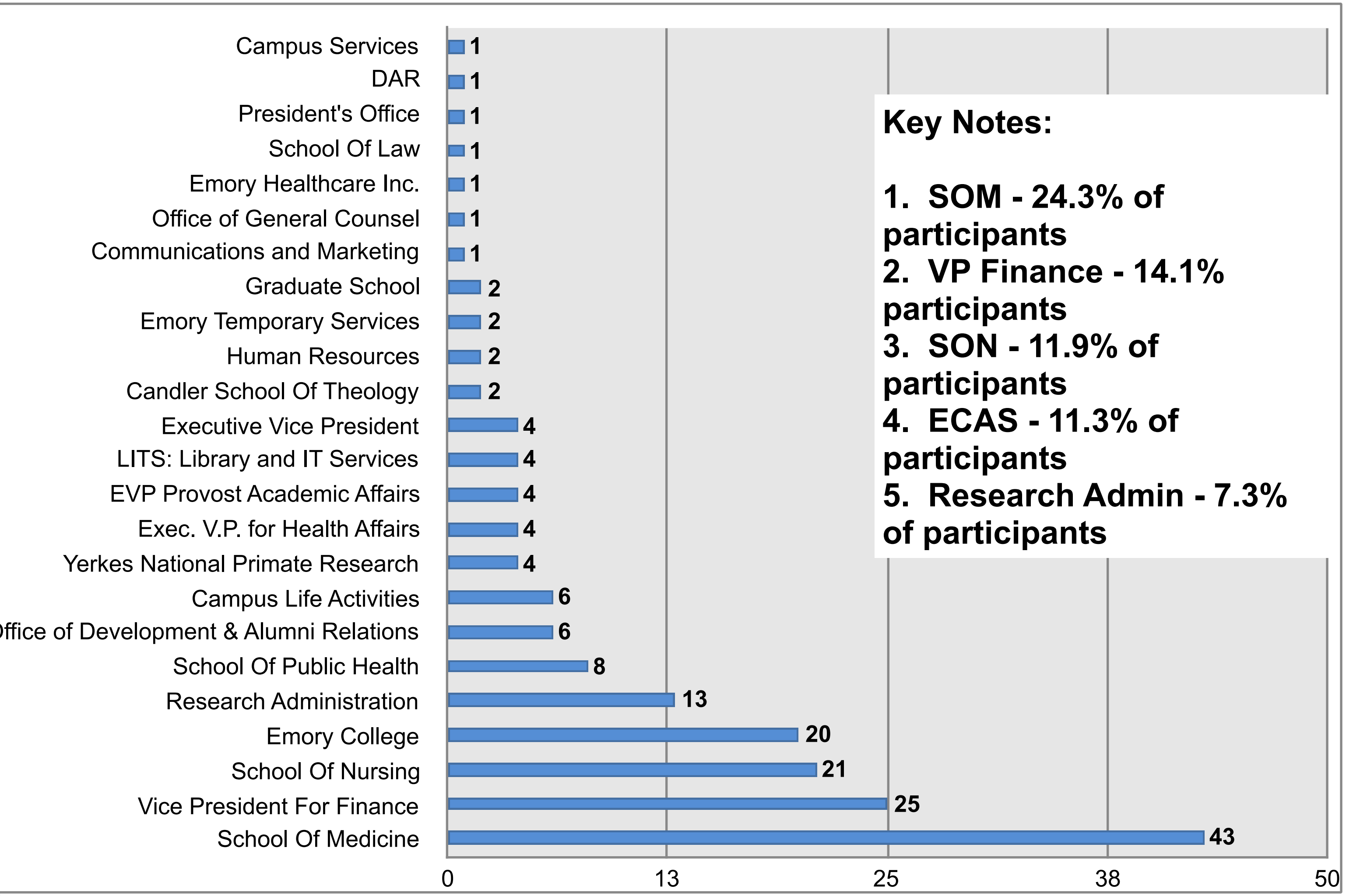
What?
Hands-on labs to allow SmartKey users to try a variety of SpeedType options and share their preferences.

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)

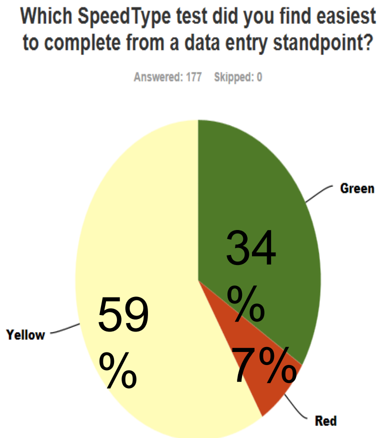


Key Notes:

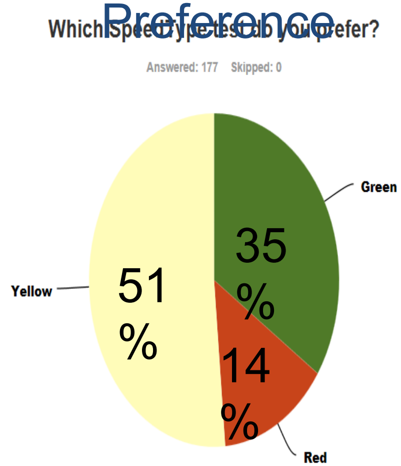
1. SOM - 24.3% of participants
2. VP Finance - 14.1% participants
3. SON - 11.9% of participants
4. ECAS - 11.3% of participants
5. Research Admin - 7.3% of participants

SpeedType Lab Results

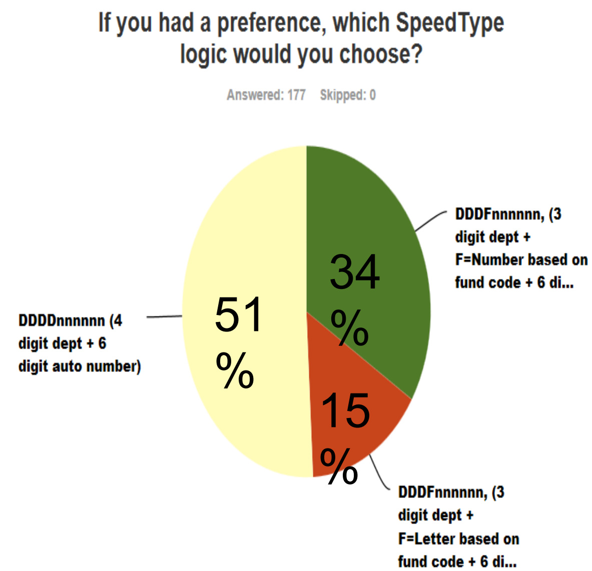
Ease



Overall Preference



Logic



Legend:

2 3 4 1 9 8 7 6 5 6

2 3 4 D 9 8 7 6 5 6 - *Steering Committee Selection*

2 3 4 6 9 8 7 6 5 3 - *User Selection*

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

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

Department Fund Code Auto-number

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Commentary Summary

"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."

234 1 987656

"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 of I was doing based on the alpha-numeric. Also, I believe this will prove beneficial for identifying the kind of project at a glance."

234 D 987656

"It was the fastest"

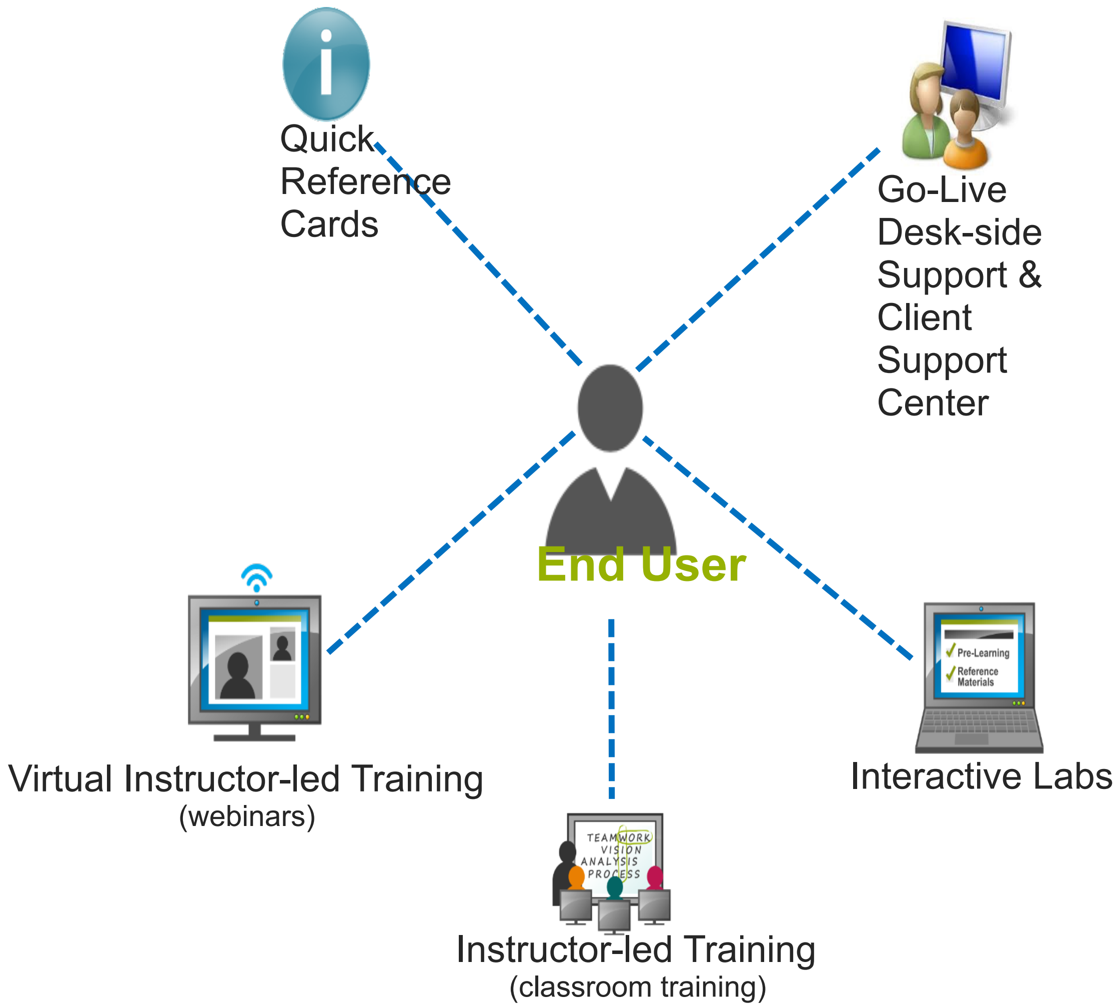
"All numeric and because three digits for the department doesn't tell you a whole lot…"

"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."

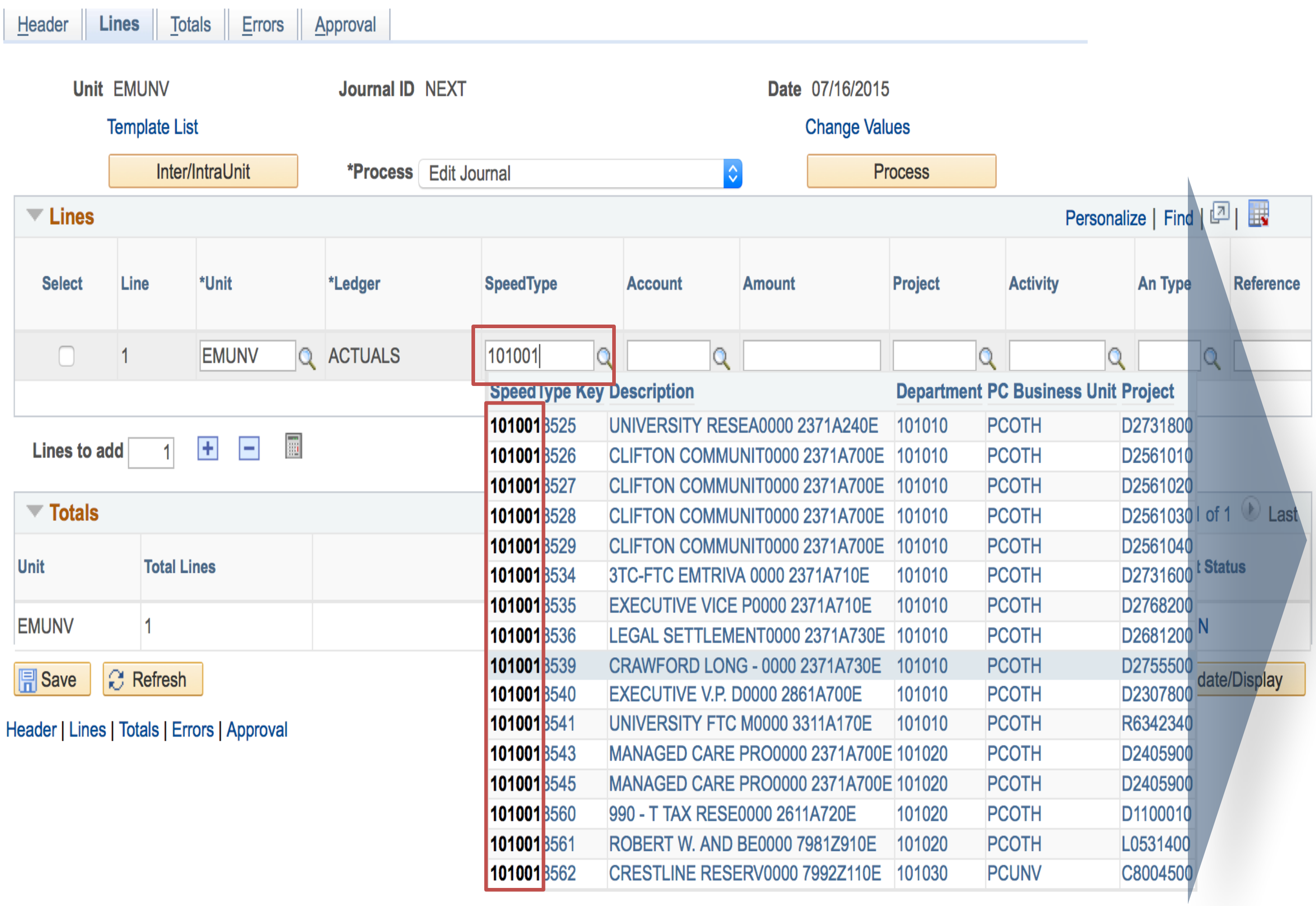
"I feel that I would get fewer drop down options with four digits."

2346 987653

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

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.

Fund Code Fringe - Recommendation

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*

Use one designated fund code

identify

Journal Mover- Overview

Existing Challenges that Require Re-Classification:

- *Grant transactions that need to be reclassified due to f*<u>*und code corrections, cost transfers, and cost sharing.*</u>
- <u>*Grant Out of Bounds Corrections:*</u> *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* <u>*not easily traceable*</u> *in the data warehouse reporting.*

Request:

Simplify the process to perform a bulk re-class that includes all of the necessary debits and credits.

Journal Mover - Consideration

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

Journal Entry Engine - Overview

- 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.

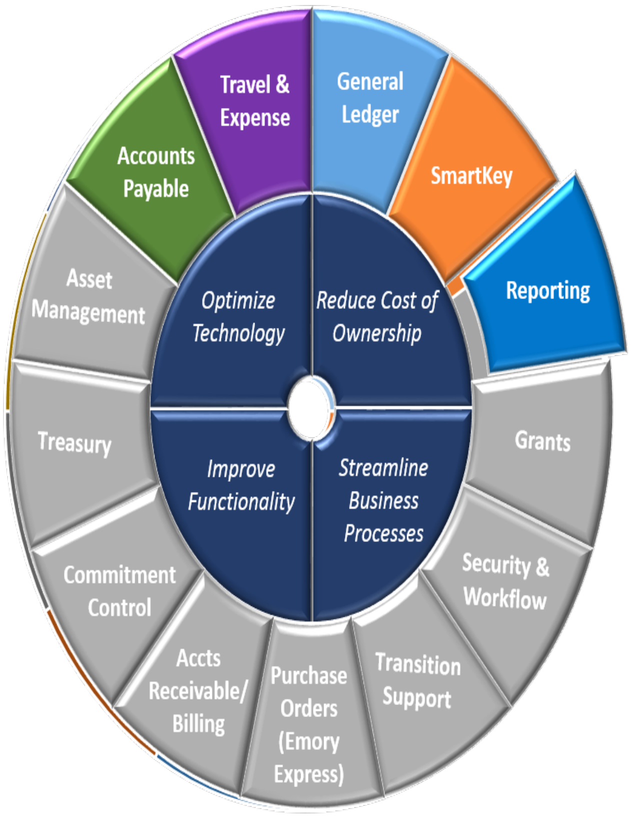
Journal Entry Engine - Recommendation

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**.

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Projected View- Unified Reporting

Type	Impacted Population	Description	Current state to Future State
Private Query	All Users	Count is expected to drop by 50% due to cleanup, as training on other t improves and as Public Queries are better cataloged	Reduce by 50%
Public Queries	All Users	Count is expected to drop by 50% due to cleanup, as training on other t improves and as Public Queries are better cataloged	Reduce by 50%
nVision	Financial Reporting	End goal is to migrate Campus end users to EBI	Migrate Campus end users to EBI
SQR	LITS, Grants, & Healthcare	Remain largely unchanged	No Change
Crystal Reports	Procure to Pay & Billing	Replaced with **BI Publisher**	Replaced with BI Publisher
EBI	All Users & Executives	According to the **Listening Tour feedback**, EBI has been well received is becoming more of the **preferred reporting tool** for Campus end user financial data	Increase EBI Use

Recommendations

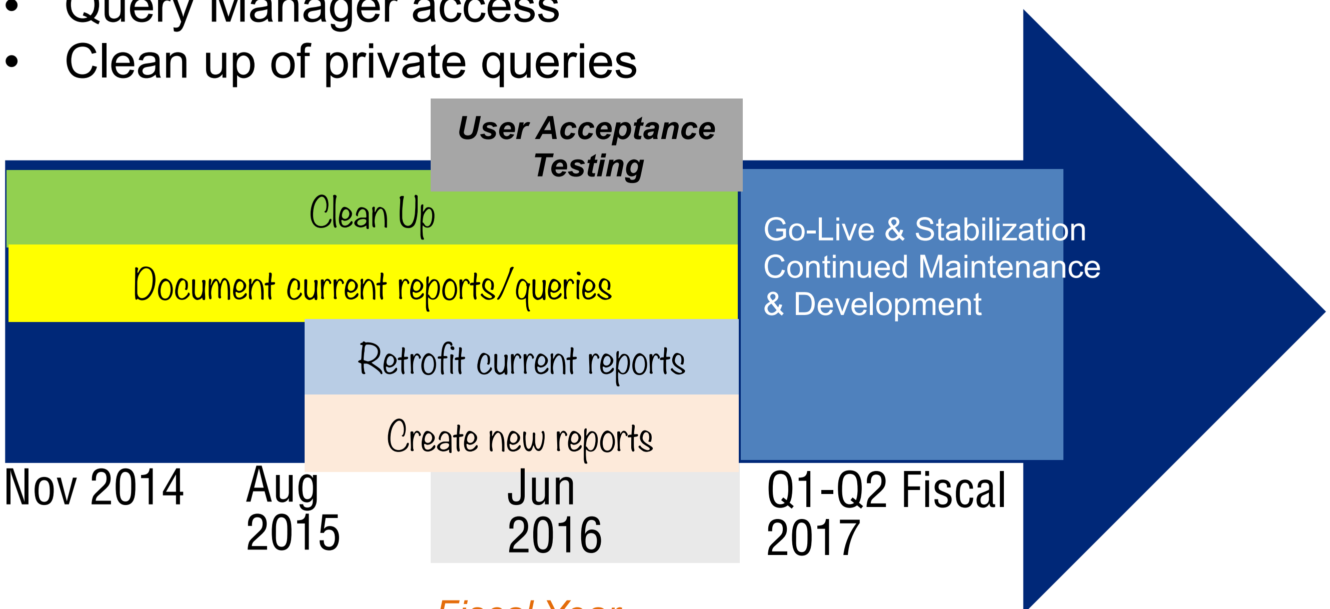
	• 1. **Clean-up** or archive the queries/reports no longer used.
	• 2. **Document** the functionality of remaining queries so users know which query to run and the expected results.
	• 3. **Retrofit** the remaining queries/reports for new PeopleSoft functionality or structure changes.
	• 4. **Create** new queries/reports that are needed to support the module business cases.

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

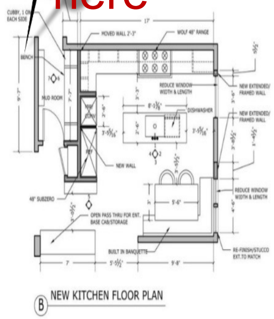


Fiscal Year

Any additional "new" reports requested <u>after the Design/Build</u> phases will go through an approval process.

Timeline subject to change

What About Training?



We are here

Step Ga

"Wish List" Design Concepts

Step 3: "Reality" Detailed Engineering Plan

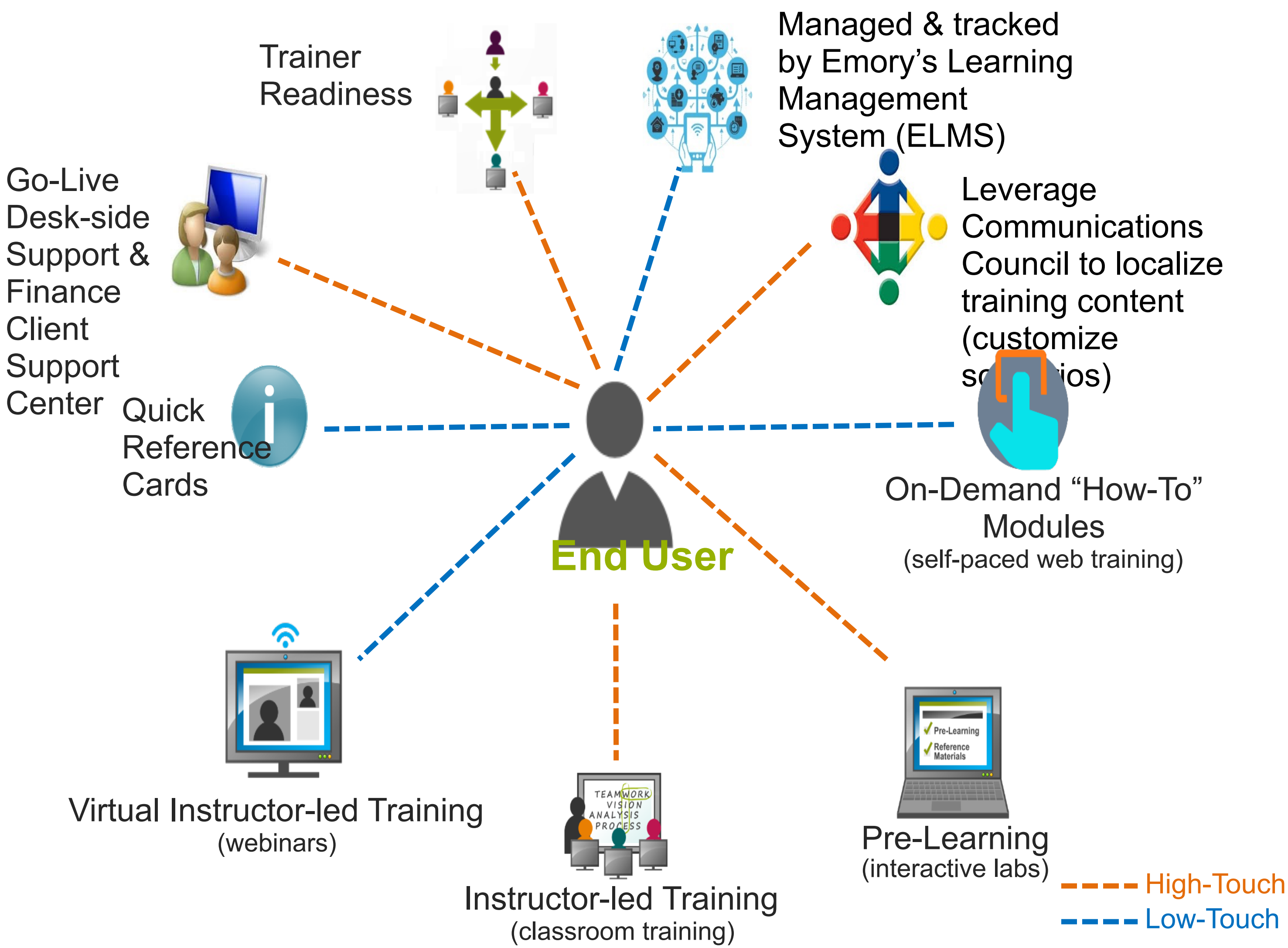
Step 4: Build/ Construct

Step 5: Inspection

Step 6: Final Walkthrough

Listening Tours → **Business Case Approval** → **Design-Business Processes & People Soft Functionality** → **Development** → **User Acceptance Testing** → **Training**

Training Strategy & Approach



Be in the Know….

ATTEND.

Compass Outreach Sessions

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

VISIT.

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

YAMMER.

yammer.com/emory.edu

- Emory is using Yammer to share, discuss projects, and get work done faster
- Keep current with the latest news & talk

READ.

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

Contact compassupgrade@emory.edu to get on the ListServ

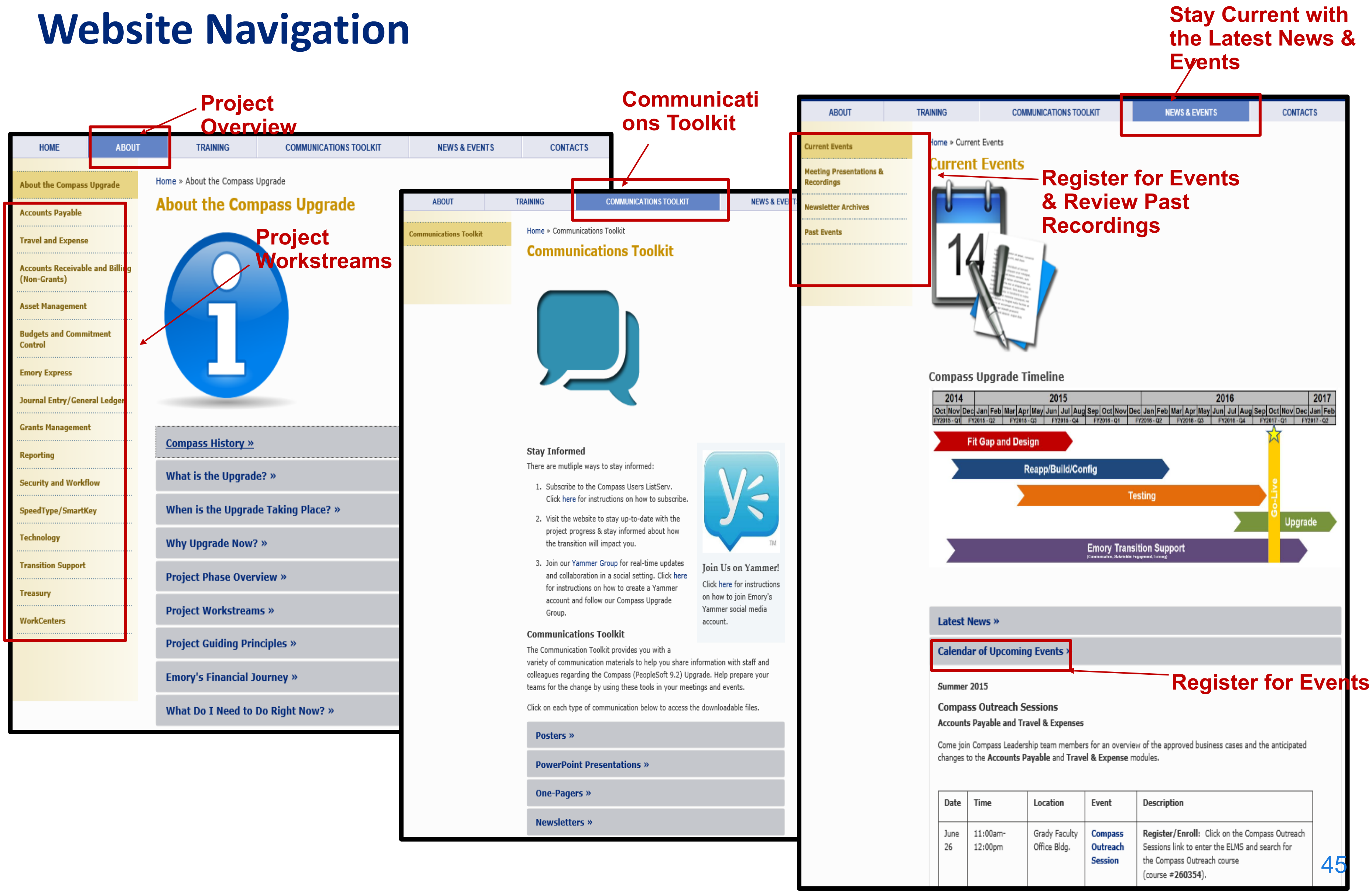
REACH OUT.

Send emails to

compassupgrade@emory.edu

For any questions, comments, concerns

Website Navigation



Program Guiding Principles

ship, collab oratio → functi onalit → prise (Univ ersity → trans paren → need and → consti tuents and → safeg uardi

Thank you for attending this Compass Outreach Session!

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

upgrade.compass.emory.edu

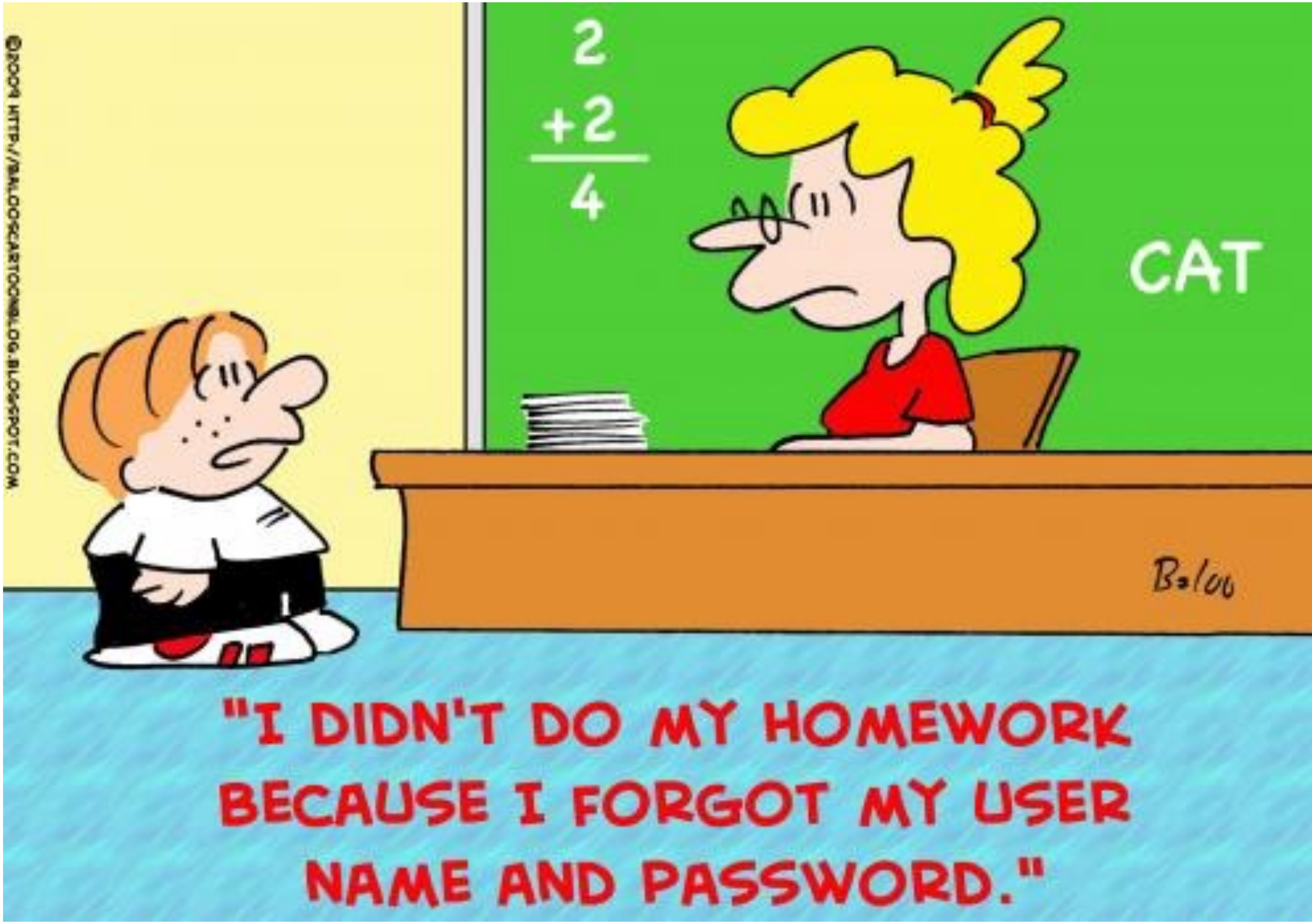
Compass

Questions

Jay Flanagan

Sr. Manager, Messaging Team

Messaging Team Updates



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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
  - 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?

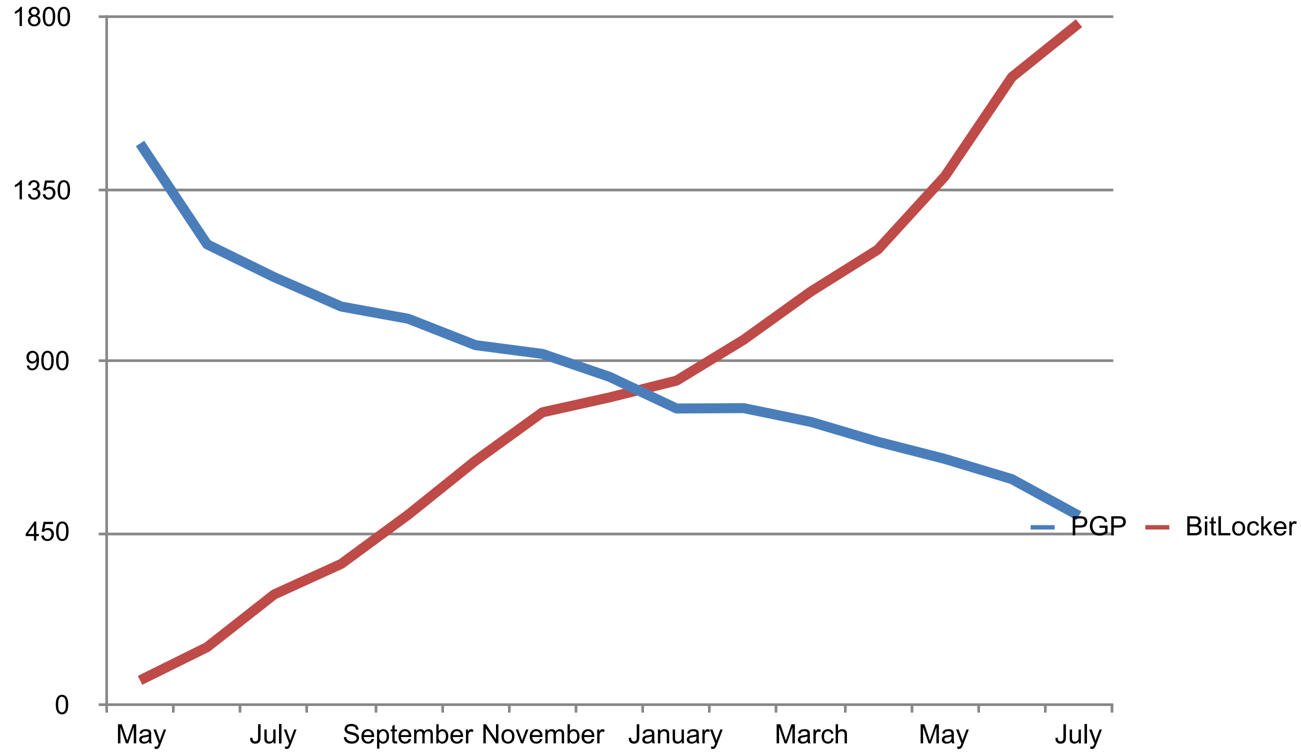
Derek Spransy
Enterprise Info Security Lead, IT Security

Security Update

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



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

Security Update

Questions

?

Thank you for coming!