

# **eMARS 3.11 User Group Report Developers**

September 11, 2017



# Meeting Agenda

- Introductions & Team Members
- EBI 4.2 Upgrade Expectations
- eMARS 3.11.1 Upgrade Expectations
- Report Reduction
- Testing Strategy
- Documentation Efforts
- Training Efforts
- Next Steps



# Introductions

Team Members & SMEs

# Introductions

- eMARS Reporting Upgrade Team
  - Ben Hoh (CGI) – COA, Vendors, Budget, KHRIS, FAS
  - Diana Holberg (SAS) – eMARS Reporting SME
  - Shelby Luby (OPS) – DC Procurement/Shopper SME
  - Joe McDaniel (CAFR) – General Acctg, Fixed Assets
  - Amy Powers (CRC) – Central Procurement, Training
  - Phil Rosell (OSBD) – Budget SME, FAS, KBUD

# Introductions, continued

- Other SMEs – Testing Statewide Reports
  - Barbara Aldridge-Montfort – Accounts Payable, FAS
  - John Bailey – General Accounting, Cost Accounting
  - Connie Downey – Travel, CRC
  - Joan Graham – Central Procurement
  - Annie Haydon – Admin, Forms, Technical
  - Sarah Jones – Vendors, VSS, Training
  - Jason Mach – COA, Revenue/Receivables
  - Donald Sweasy – EBI, Disb/Treas, KHRIS, Security (+ More)
  - Jessica Wilkerson – Fixed Assets
- All Core Team Members – Prioritization of Issues, Conversion
- All CGI & EBI Support Staff – Assistance as needed



# **EBI 4.2 Expectations**

Affecting All EBI Users

# EBI 4.2 Expectations



## Report Design

- Data Merges
- Report Tabs
- Page Layout & Formatting
- Headers / Footers
- Sections / Breaks
- Tables of Data



## Query Design

- Result Objects
- Query Filters
- Scope & Analysis
- Query Properties
- Combined Queries



## eMARS Reporting: CMC & WebI

- Documents ("Reports")
- Folders
- Universes
- eMARS Reporting Security



## EBI: CMS & BI

- Launchpad
- Scheduling
- "My Favorites"
- "Inbox"
- EBI Accounts
- Other App Security (e.g., FAS3, KBUD, etc.)



## Data Warehouse

- Oracle Database
- eMARS Data (via nightly ETLs)
- MRDB2 Views

ORACLE  
DATABASE



# EBI 4.2 Expectations

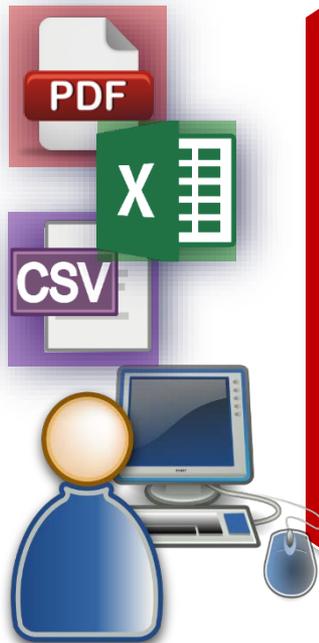
- Currently on EBI 4.1 in Production
- eMARS Reporting among the first to upgrade to 4.2
- Very few interface changes
- Audit universe in progress by EBI Support



# **eMARS 3.11.1 Expectations**

Affecting eMARS Reporting Users & Report Developers

# eMARS 3.11.1 Expectations



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# eMARS 3.11.1 Expectations

- “Baseline” Universes
  - Mostly the same
  - No widespread report redevelopment required
  - Potential New Travel Universe
- “Custom” Universes
  - Analyzing to eliminate any no longer needed
  - Accounts Payable Open Items universe
    - FIN-Document Catalog universe
  - Redevelop any reports using APOI now

# eMARS 3.11.1 Expectations

- Statewide Reports
  - Reviewing to combine where possible
  - Applying more consistent standards & conventions
  - Creating a folder of Shortcuts as an index
- Reports in Agency Reports Folders
  - Already reduced from over 30,000 to just over 5,000 (not including “My Favorites”)
  - Still need to reduce to a manageable number
  - Set target goals for each Department/Folder
  - Regular monitoring/meeting (at least monthly)
  - Establish ongoing monitoring/cleanup process



# Report Reduction

Affecting All eMARS Reporting Users

# Report Reduction - FAQs

- Why?
  - More reports = Fewer resources for other activities
  - Storage space costs; support demands
  - Spiraling effect = can't find report so make new one
- What might we do if managing fewer reports?
  - Better, smarter, strategic approach to reporting
  - Better folder structures and report indexing
  - Performance improvements
  - Simplified universes
  - Implement report scheduling and/or bursting in EBI

# Report Reduction – Strategy

- Reports in “My Favorites” and “Inbox” Folders
  - Big unknown: How many are there?
  - Big unknown: Which ones are needed?
  - **NOT** moved to new environment
- Agency responsibility (as soon as possible):
  - Review “My Favorites” and “Inbox” with each user
  - Delete unneeded reports (**LOTS** of duplicates!!)
  - Move needed reports to Cabinet or Agency folder
  - **DO NOT** just dump them to Agency folder!!!
  - Set date for mass removal (as soon as feasible)

# Report Reduction - Strategy

- For convenience, create Shortcuts to Agency (or Statewide) reports in “My Favorites”
- If possible, Shortcuts retained during cleanup

- To create a Shortcut:



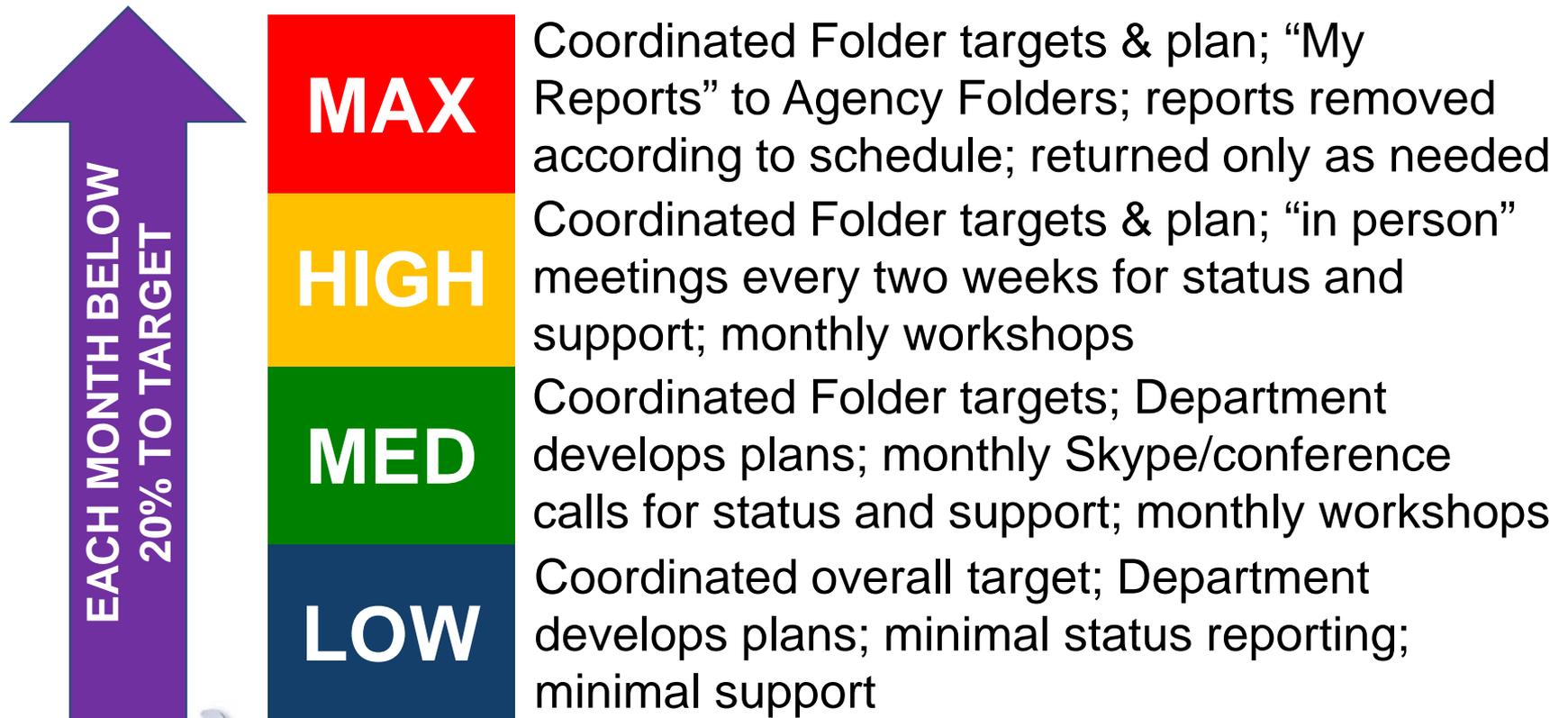
- ✓ Navigate to report in Agency Reports folder
- ✓ Right-click report title in list (instead of open)
- ✓ Choose *Organize* → *Create Shortcut in My Favorites*
- ✓ Navigate to My Favorites to locate Shortcut

# Report Reduction - Strategy

- As Soon As Possible:
  - Set target for each Department/Agency folder
  - Set interaction level (**LOW**, **MED**, **HIGH**, **MAX**)
- Ongoing:
  - Assessment of Departmental status each month
  - 20% progress toward targets each month
  - Any month with less, Department moved to next higher interaction level until caught up
  - Start earlier to get your preferred interaction level!!

# Report Reduction - Strategy

- Choose Interaction Level (soon to ensure desired level):



# Report Reduction - LOW

- **LOW** = First Interaction Level
  - Agree upon overall target number (minimum 50% reduction)
  - Agency sets their own folder targets (to sum to overall target)
  - Agency determines their own strategy and approach for meeting targets
  - Monthly Skype/conference calls to discuss status
  - Email support for Report Developers

# Report Reduction - LOW

PROs	CONs
1. Maximum flexibility for Departments needing that	1. Maximum requirement for internal communication with users
2. Minimum time required for coordination and communication with Reporting Team	2. Minimal Knowledge Transfer with Reporting Team
3. Maximum potential for internal Departmental training	3. No workshops for users prior to eMARS training
4. Full ability to prioritize with other Departmental needs	4. Based on past upgrade experience, highest risk of targets not being met

# Report Reduction - MED

- **MED** = Second Interaction Level
  - Agree upon target numbers for each folder (minimum 50% overall reduction)
  - Agency determines their own strategy and approach for meeting targets
  - Monthly Skype/conference calls for status & support (+ email)
  - Monthly workshops for Report Developers (optional)

# Report Reduction - MED

PROs	CONs
1. Balances flexibility with Reporting Team communication	1. Significant requirement for internal communication with users
2. User workshops available before eMARS training is offered	2. Reduced communication with Reporting Team
3. Significant ability to prioritize with other Departmental needs	3. Significant risk of targets not being met

# Report Reduction - HIGH

- **HIGH** = Third Interaction Level
  - Agree upon target numbers for each folder (minimum 50% overall reduction)
  - Agency prints first/last page of reports + each query design
  - Kickoff meeting to prioritize
  - Meetings every two weeks for status and support (+ email support)
  - Monthly workshops for Report Developers (optional)

# Report Reduction - HIGH

PROs	CONs
1. Relative assurance that targets will be met	1. Potential for loss of infrequently run reports
2. Reduced requirement for internal communication with users	2. Reduced flexibility for departments choosing this option
3. Maximum communication and coordination with Reporting Team	3. Meeting time required for coordination and communication with Reporting Team
4. Maximum potential for increasing user skills via meetings and workshops (plus training later)	4. Users will learn the Statewide approach rather than any Department-specific one

# Report Reduction - MAX

- **MAX** = Fourth (& Highest) Interaction Level
  - Agree upon target dates & numbers for each folder (minimum 50% overall reduction)
  - Kickoff meeting with all Departmental users
  - All users move “My Favorites” and “Inbox” reports to new Agency sub-folders by agreed upon date
  - According to schedule, all reports in each folder removed (except any agreed upon ahead of time)
  - Individual reports moved to Agency folders only as needed, staying within target numbers

# Report Reduction - MAX

## PROs

1. Highest assurance that targets will be met prior to “Go-Live”
2. Highest assurance that users understand the consequences of this option prior to “Go-Live”
3. Minimal time required for coordination with Reporting Team

## CONs

1. Significant risk of losing infrequently run reports
2. Inconvenience for Department impacts end-users needing reports now, rather than later
3. No potential for increasing user skills prior to training

# Questions?



# Report Reduction - FAQs

1. Can reports not run in the past year be automatically moved out of the Agency folders?
  - Possible, but could result in loss of "reference" reports - agencies need time to handle those.
  - Very high risk of removing less frequently run - but needed - reports (such as biennial budget prep or lengthy Federal project reports).
  - Determine whether this can be done by Department if not the right approach for all.

# Report Reduction - FAQs

2. Will reports not run in the past year be removed? We need some of them!
  - This will need to be determined department by department
  - Biennial budget reports and other long-term program reports need to be identified
  - Possibly establish a naming convention
3. Can we get a list of reports and the last date refreshed?
  - Uncertain with EBI; working with them on this

# Report Reduction - FAQs

4. Can reminders be sent to users (say, on a semi-monthly basis) about cleaning out "My Favorites" and "Inbox" reports?
  - Yes – easily be done by a Department; can also be done centrally upon request
5. Will this be like the last upgrade, where we have to move reports to a specific location or we lose them?
  - To be determined – but hopefully not
  - Remember, for FY18 (and prior) reports will still exist in old EBI

# Report Reduction - FAQs

6. Will we be able to get copies of report designs/documents in the new EBI (from the old EBI) after “go-live”?
  - To be determined – but hopefully so
7. This isn’t a good time for us – can we do this another time?
  - There is never a good time – and “no time like the present”!



# Testing Strategy

Testing EBI 4.2, eMARS 3.11.1 universes,  
Statewide & Agency Reports

# Testing Strategy

- Process eMARS transactions and make sure they appear on Statewide Reports (SMEs)
- Refresh all Statewide Reports, comparing to existing Statewide Reports (in Production)
  - Timings
  - Page Counts
  - Totals
- Create new queries/reports against each universe
  - For primary functionality
  - For secondary functionality

# Testing Strategy

- Now through mid-2018
  - Execute all training exercises
  - Complete additional documented testing scenarios
  - Send any specific scenarios to [Diana.Holberg@ky.gov](mailto:Diana.Holberg@ky.gov)
- Mid-2018 – Final testing & prep for “Go-Live”
  - Performance testing with simulated users
  - Reporting to support cutover activities

# Testing Strategy

- Join the team!

**Each Cabinet permitted ONE Reporting representative to join Reporting Team meetings and participate in testing**

- Meetings every two weeks (or so)



# Documentation Efforts

For Universities, General Reference, Statewide Reports

# Documentation Efforts

- List of Statewide Reports with descriptions
- List of Universes with descriptions
- Universe documentation
  - Adding customizations and finalizing as part of upgrade
  - Feedback requested
- Reference documentation
  - Outline exists
  - Parts are drafted; used for GAPS workshop
  - Reviewing and publishing as part of upgrade



# **Training Possibilities**

For Universities, General Reference, Statewide Reports

# Training Possibilities

- Not necessarily following upgrade schedule
  - Navigation basics covered during workshops
  - Introductory classes planned during upgrade timeframe
  - Advanced classes as time permits
- Knowledgeable resources currently limited
- Accepting volunteers as trainers or facilitators

# Training Possibilities

- Possible Curriculum:
  - Basic EBI/eMARS Reporting Concepts:
    - **Basic eMARS Reporting Concepts**  
Chart of Accounts, Basic navigation, Folder structure, Basic Query design, Basic formatting
    - **Intermediate eMARS Reporting Concepts**  
Formulas, Variables, Sections, Breaks, introduction to merging

# Training Possibilities

- Possible Curriculum (continued):
  - Advanced eMARS Reporting Concepts (by Functional Area):
    - **Introductory Budget Reports**  
Operational Budget Amounts, Capital Projects Budget Amounts, Grant Budget Amounts
    - **Advanced Budget & Accounts Payable Reports**  
Encumbrances & Expenditures, Operational Budget Balances, Capital Projects Budget Balances

# Training Possibilities

- Possible Curriculum (continued):
  - Advanced eMARS Reporting Concepts (continued):
    - **Travel, Payroll & Documents**  
Travel Detail, Personnel, Payroll, Security & Workflow
    - **Contracts & Cited Authority Reports**  
Procurement Awards Report, Contract Expenditure Report, Cited Authority Report

# Training Possibilities

- Possible Curriculum (continued):
  - Advanced eMARS Reporting Concepts (continued):
    - **Fixed Assets Reports**  
Assets by Custodian Report, Assets by Location Report, CAFR-Reportable Fixed Assets Report
- More to come...
- Send preferences / priorities to  
[Diana.Holberg@ky.gov](mailto:Diana.Holberg@ky.gov)



# Next Steps

See you soon!

# Next Steps - Team

- Send out User & Agency Folder Report lists
- “Kickoff” meetings with Cabinets/Departments
  - Capitol Annex Room 182 at 2pm and 3pm  
Tuesdays and Thursdays
  - Follow up meetings (by Skype where available)
- Workshops in Computer Labs
  - Basic Navigation – 9/18 and 9/22; see KELMS
  - Monthly for **MED** and **HIGH** Interaction Level  
Departments
  - Bring specific reporting needs or issues

# Next Steps - Team

- Possible Break-Out Focus Groups
  - Implementing EBI Report Scheduling Capabilities
  - Documentation & Training Needs
- We welcome your ideas - Contacts:
  - Diana Holberg – [diana.holberg@ky.gov](mailto:diana.holberg@ky.gov)
  - eMARS Core Team – [EMARSCoreTeam@ky.gov](mailto:EMARSCoreTeam@ky.gov)

# Next Steps - Agencies

- General
  - Determine whether to send a Reporting representative (ONE per Cabinet) to Reporting Team meetings
  - Enroll new Report Developers in 9/18 & 9/22 workshops (see KELMS)
- “My Favorites” Reports
  - Determine counts (for planning purposes)
  - Review with eMARS Reporting Users
  - Delete unneeded reports (**DUPLICATES!**)
  - Move needed reports to Cabinet/Agency Folders
  - Create Shortcuts in “My Favorites” for convenience

# Next Steps - Agencies

- Agency Reports
  - Determine best Interaction Level for your Cabinet/ Department
  - Communicate ASAP to [diana.holberg@ky.gov](mailto:diana.holberg@ky.gov)
  - Develop report reduction plan
  - Proceed to reduce reports (minimum 50%) in a timely manner



Coordinated targets/plan; reports removed NOW; provided as needed

Coordinated Folder targets & plan; regular meetings; workshops

Coordinated targets; Department plans; monthly status/workshops

Coordinated overall target; Department plans; minimal status / support

# eMARS – Tools and Resources

- eMARS Website
  - <http://finance.ky.gov/internal/emars>
  - Continuous updates throughout the project
  - Check for updates frequently!
- eMARS Newsletters and Presentations
- Focus Groups
- Other eMARS Plan Documents
- eMARS Alerts and Broadcasts