

## Frequently Asked Questions (FAQs) regarding the EBI 4.2 / eMARS Reporting 3.11.1 Upgrades

### Statewide Reports

1. Can Statewide Reports be modified to add optional filters (to reduce need for Agency Reports)?

Again, this depends upon the request. If the request is for a Chart of Accounts element in use by most agencies (such as Activity), an optional prompt can be added. If, however, the request is for something that is not used by very many agencies, a different solution will be recommended. Please send in these requests as early as possible so that appropriate resolutions may be determined with the assistance of eMARS Subject Matter Experts, and the work prioritized along with other upgrade activities.

2. If one of our needed Agency Reports would benefit other agencies, can it be made into a Statewide Report (and reduce our Agency Report count)?

These requests are being considered on a case-by-case basis. Contact Diana Holberg if you have a report you believe would be better handled as a Statewide Report. A number of these reports have already been identified and are in progress to become Statewide Reports.

### Agency Report Reduction

3. What if we need more than 50% of our Agency Reports?

That is not a problem – the goal is not to eliminate 50% of reports at all costs. The goal is to export/delete unneeded ones, consolidate needed reports, and choose better tools and/or sources of data where appropriate. In addition to the objectives listed in the slides, it is key to reduce the number of reports as much as possible before refocusing on a better, more strategic approach toward data retrieval (so that fewer queries and reports will be affected once that strategy has been determined).

4. Do deleted “My Favorites” reports and Inbox reports count toward the 50% report reduction counts for agencies?

Technically, they do not. But keep in mind that the goal is not “reduce reports at all costs” but rather to make smarter decisions regarding our approach to financial reporting. If your department moves a lot of “My Favorites” reports to the Agency Reports folders because they are required for legitimate purposes (rather than just dumping them out there so they won’t be lost during the upgrade), we can agree on a more appropriate target for your agency’s Report Reduction effort.

5. Can you clarify the circumstances under which “My Favorites” reports should be moved to Agency Reports?

In general, they should be moved to Agency Reports if (a) they are needed and (b) there is no better method by which to obtain the data in the needed format. If only the data is needed (and not printed, formatted reports), consider MRDB2. Also consider the future possibility of scheduling within eMARS Reporting– you may choose to keep needed data queries in eMARS Reporting until the scheduling criteria are clearly defined.

6. When we are reviewing “My Favorites” reports, what should we do with those stored in the “WebIntelligence” sub-folder?

Reports in all sub-folders to “My Favorites” will be lost during the upgrade next summer. Therefore, if you have kept any needed reports in the “WebIntelligence” sub-folder, you will need to relocate it to Agency Reports in order to retain it. But keep in mind that reports are only stored in that sub-folder when a WebI session times out with that report open, so chances are you already have a permanent copy of the report stored elsewhere.

7. How will “My Favorites” reports be managed in the new system?

Developing a process by which we can maintain an appropriate volume of reports (including “My Favorites” and Agency Reports) is one of the objectives of the upgrade effort.

8. When must Report Reduction be completed?

To be determined; the hope is a May-June timeframe, but for technical testing purposes the deadline may have to be sooner.

### Interaction Levels

9. Does the Interaction Level affect support agencies receive through CRC?

No. Interaction Level is used solely as a fast method of requesting greater or lesser communication with the eMARS Reporting Upgrade Team in Finance, scheduling status meetings and/or Skype calls, and determining appropriate wait-listing for workshops.

10. If we choose a lower Interaction Level and later desire a higher one, is that possible?

Yes. As long as progress is made toward the objective agreed upon, a Cabinet/Department may choose to adjust the Interaction Level up or down at any time.

11. What is the deadline for each Cabinet/Department to request an Interaction Level?

Interaction Level choices are needed as soon as possible, as they will determine the scheduling of meetings related to the upgrade effort. If a Cabinet/Department has not sent in an Interaction Level prior to the time it becomes necessary to schedule a Kick-Off meeting, the Reporting Lead for that Cabinet/Department will be contacted.

### Meeting Attendance

12. Is attendance mandatory for the Kick-off meetings and Status meetings (or Skype calls)?

No. The meetings are intended to be of assistance to your Cabinet/Department in the Report Reduction effort. So long as the eMARS Reporting Team is kept apprised of your Cabinet/Department’s status and steady progress is being made as agreed upon, no meeting is mandatory. If necessary, the Reporting Lead for your Cabinet/Department will be contacted to make different arrangements for obtaining a status.

13. Is it required for all Report Developers to attend the initial meeting?

Not required. It is preferable for **HIGH**; it’s essential for **MAX**. Abbreviated organizational meetings are available to **MED** and **LOW** Interaction Level Cabinets/Departments.

## Workshops vs. Training

### 14. Are workshops the same as training?

They are not. Workshops are primarily intended for Report Developers to bring in their own work – either because they require the dedicated time to make progress or because they need assistance with an issue. That said, a brief instruction on basic navigation will be presented, and a handout/activity (excerpted from reference materials) will be provided to attendees needing to learn navigation and basic query/report design. Workshops are included in KELMS primarily for enrollment tracking and wait-listing purposes.

As outlined in the slides, Basic/Introductory and Intermediate training will be scheduled toward the end of the upgrade period; advanced classes will follow as time permits.

15. Is the training (Basic/Introductory, Intermediate and Advanced) going to be available to anyone, or only to Report Developers, or only to team members?

Again, only Basic/Introductory and Intermediate classes are planned for the upgrade period. As of this time, there is no plan to restrict enrollment (although the Basic/Introductory class will be a prerequisite for the Intermediate class).

16. What happens if an individual from a Department/Cabinet that has requested a **LOW** or **MAX** Interaction Level signs up for a workshop?

First of all, it is expected that Report Developers and/or Reporting Leads will communicate regarding their Department/Cabinet's selected Interaction Level and any changes made in that level to avoid such a scenario.

That said, if the scenario does occur and the workshop is not full, the individual will be scheduled to attend with no issues. If the workshop fills and someone from a **MED** or **HIGH** Interaction Department is wait-listed, the Reporting Lead for the person scheduled in the workshop will be contacted to determine whether the Interaction Level should be adjusted. If not, and it is not possible to accommodate both individuals enrolled, the individual scheduled for the workshop will be rescheduled to the next available workshop date. The wait-listed individual will then be able to attend the earlier workshop.

#### Data Availability after Go-Live

17. Starting fiscal year 2019, will users need to obtain financial data from two separate locations?

The answer to this question depends on the data being retrieved. As of right now, cash balances will be available in the new Data Warehouse, as will grant balances. The exact specifics of the data conversion are still to be determined; those discussions are in progress.

18. Will queries against MRDB2 (using MS Access or another tool) be affected?

The ODBC Connections and database table links will need to be updated (similar to what was required for the recent LinuxOne database migration). Where data from FY19, FY18 and earlier fiscal years is required, the queries will need to be executed against the old Data Warehouse for FY18 and older data and the new Data Warehouse for FY19 data.

## Information from eMARS Reporting Upgrade Team

19. Can a list of Report Developers be provided to each Cabinet/Department?

Yes. ~~There have been some issues with the process identified for retrieval of that list, but each Cabinet/Department will receive a list as quickly as possible.~~ Departments which have turned in Interaction Levels should have received a list. If not, please contact Diana Holberg ([dianaholberg@ky.gov](mailto:dianaholberg@ky.gov)). Lists of Basic Users will be distributed soon.

20. Will the testing environment be available for non-team members?

To be determined; not before the conclusion of System Testing (underway until November).