August 16, 2017

Non-Sponsored FORT UAT Kick-Off

Agenda

- Background
- Non-Sponsored Financial Outlook Reporting Tool Demo
- Q&A
- Roles & Responsibilities
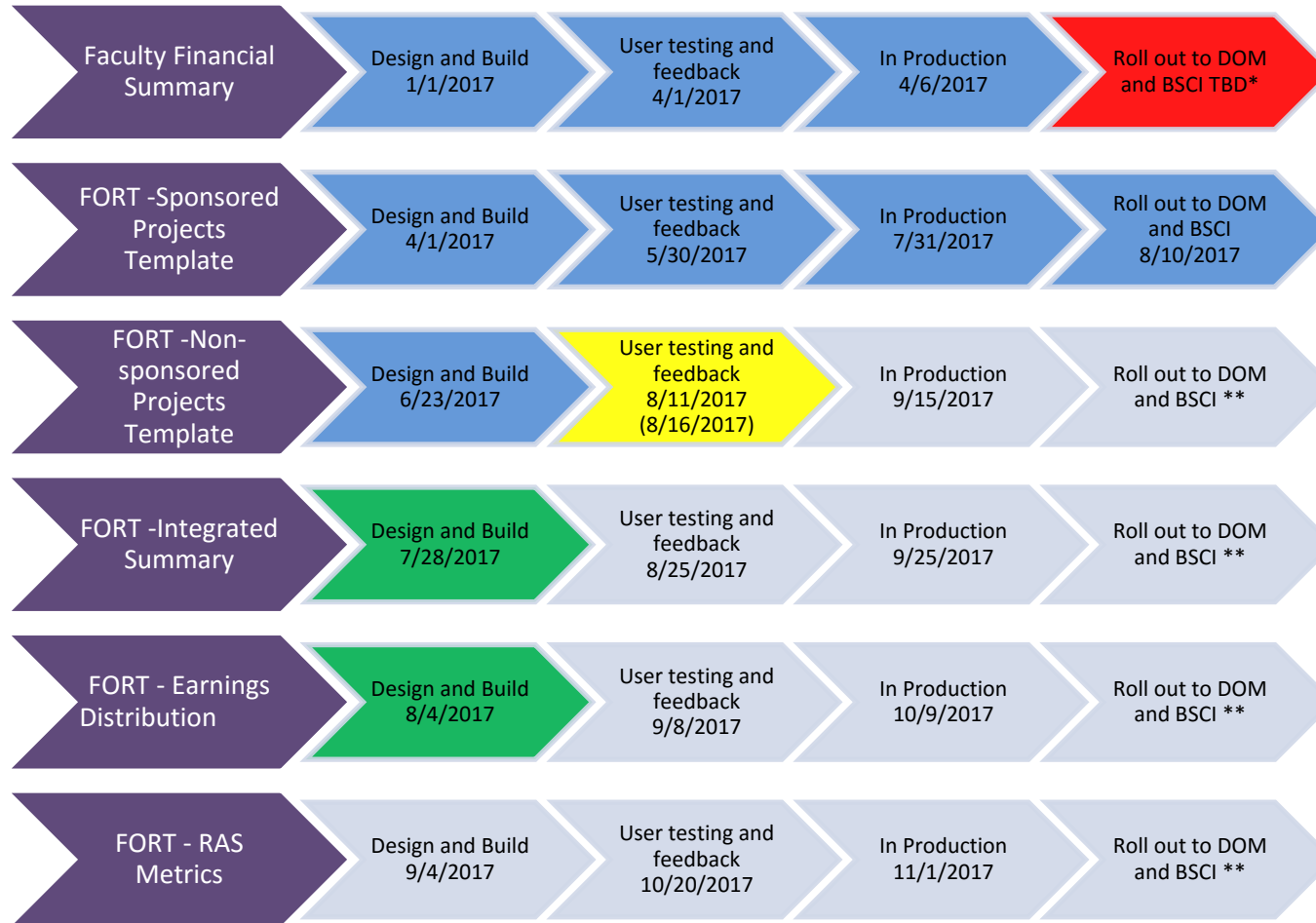- Timeline
- Resources

Background

In Summer 2016, the Office of Finance Systems and Data Analytics (OFSDA) was engaged by the RAS leadership, the RAS unit Chief Business Officers, the RAS Task Force (representing the University Faculty Council (UFC)) and the School of Medicine Business & Finance leadership to consider ways to address inefficiencies in data access, reporting and projections.

As a result of the feedback obtained from working sessions with RAS Task Force representatives and other faculty, OFSDA agreed to focus on three areas:

(1) the development of a **consolidated financial view for faculty** with minimal clicks and a focus on what faculty need to know

(2) **reduction of manually intensive tasks on RAS staff** to allow them additional capacity to support faculty and

(3) **improved metrics** to track accountability in meeting agreed-upon services for faculty.

Development Schedule and Progress

Faculty Financial Summary	Design and Build 1/1/2017	User testing and feedback 4/1/2017	In Production 4/6/2017	Roll out to DOM and BSCI TBD*
FORT -Sponsored Projects Template	Design and Build 4/1/2017	User testing and feedback 5/30/2017	In Production 7/31/2017	Roll out to DOM and BSCI 8/10/2017
FORT -Non-sponsored Projects Template	Design and Build 6/23/2017	User testing and feedback 8/11/2017 (8/16/2017)	In Production 9/15/2017	Roll out to DOM and BSCI **
FORT -Integrated Summary	Design and Build 7/28/2017	User testing and feedback 8/25/2017	In Production 9/25/2017	Roll out to DOM and BSCI **
FORT - Earnings Distribution	Design and Build 8/4/2017	User testing and feedback 9/8/2017	In Production 10/9/2017	Roll out to DOM and BSCI **
FORT - RAS Metrics	Design and Build 9/4/2017	User testing and feedback 10/20/2017	In Production 11/1/2017	Roll out to DOM and BSCI **

*Waiting on the fix for 30 SOM projects where the fund balance and NSP Budget Available are not in line. Rollout also depends on completion of roles assignments and scheduling in department meetings.

** Depends on scheduling and availability

Blue	• Complete
Green	• Started/on track
Yellow	• At Risk
Red	• Blocked/Behind Plan
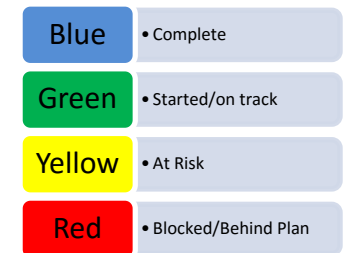
NSP Financial Outlook Reporting Tool (FORT)

NSP FORT DEMO

FORT Q&A

Roles and Responsibilities

Roles and Responsibilities of UAT Testers

- Test the NSP FORT Template and provide timely feedback to EBI team to ensure that final template has maximum value for end users
  - Feedback via email or Google Form (on FORT website)
- Template Feedback
  - Data Testing
    - Compare to NSP Trend in EBI
    - Check totals and spot check specific account codes
  - Functionality Testing
    - Do valid IDs return data?
    - Are hyperlinks active?
    - Can you upload?
  - Design
    - Ease of understanding information presented
- Job Aid and Website Feedback
  - Clarity
  - Completeness

NSP FORT UAT Timeline

NSP FORT UAT Timeline

- Begin using NSP FORT Template immediately
- Critical/major change items should be communicated **no later than EOD 8/24**
- All feedback must be communicated **no later than EOD 8/31**
- Enhancement expectations
    - All fatal flaw feedback will be incorporated prior to launch of NSP Template
    - Testers should identify whether enhancements are "need to have"/"nice to have"
        - Every effort will be made to include "need to have" enhancements prior to launch
        - "Nice to have" enhancements may be deferred to future enhancement phase
    - Every attempt will be made to include all enhancements requested, but may not be possible due to lack of available data or the constraints of the tool

FORT Support

Job Aid

- Step by step job aid will be provided to assist pilot group with running reports.
- The job aid is also a part of the pilot and feedback is welcomed.

Log a ticket

- You log a ticket at: FSC Community Website. If you need more information on opening a ticket, please reference the job aid HOW TO OPEN A TICKET.

    - Category: Emory Business Intelligence
    - Subcategory: Financial Outlook Reporting Tool

Website

- ebi.emory.edu/FORT

Missing Pieces?

For additional info:
ebi.emory.edu/FORT

Thank you for being in our Beta Group!!