



Information Systems & Services

**Operational Highlights  
Joint Operations Group Report  
May 2002  
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**Laboratory Wide Strategic Planning**

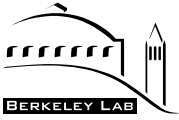
Prioritization and funding for FY2003 (October 2002 – September 2003) strategic information technology projects is underway. A lab-wide committee composed of operations leadership has met to review and discuss these strategic projects. The proposed projects include:

- Assessing a new budget system – Due to LBNL's varied funding sources and reporting requirements, the current budgeting tool does not meet the requirements of users. A cross-functional effort is required to determine the needs and scope for a fully functional budget system.
- Developing Berkeley Lab Information Systems (BLIS) – LBNL's existing data warehousing and reporting efforts do not entirely meet the needs of the lab's diverse users. ISS is proposing the development of an integrated suite of information delivery systems that will allow users to create ad hoc queries, access standard reports, and provide decision support using both enterprise and local data.
- Implementing RAPID phase II – LBNL is currently implementing RAPID (PeopleSoft Grants). This system provides post award administration. Phase II of this project will provide functionality to support proposal submission.
- Implementing Maximo Release 5 – LBNL uses Maximo, a commercial system, to manage and schedule facilities related work requests, projects, maintenance, central stores inventory and fleet operations. Release 5 is a web based application that will allow enterprise wide access to data.
- Upgrading the lab's Chemical Inventory System – LBNL's current inventory of chemicals is manually updated on an annual basis. The Environmental Health and Safety division is proposing a new system that allows for real time updates from individual labs, with a user-friendly interface and expanded reporting capabilities. An upgraded Chemical Inventory System will bring us into compliance with local, state and federal regulations.

**Applications Portfolio Management**

During this reporting period ISS made significant efforts in upgrading and implementing many key enterprise applications.

- *Purchasing, Procurement and Payables implementation* – Continued implementation of PeopleSoft PRP (Purchasing, Receivables and Payables, and eProcurement) system. Planned go live date is July 1, 2002.
- *RAPID implementation* – Continued implementing the RAPID (PeopleSoft Grants) system. This system provides post award grants administration functionality. Scheduled go live date is August 7, 2002
- *Gelco Travel system implementation* – Continued implementation of a new travel system. Worked with the vendor to install version 8.1 of the Gelco Travel Manager software. Project is on track for September 2002 roll out.
- *Consolidated Billing Phase II installation* – Consolidated Billing Phase II was installed in March. This adds AD&D, Disability and Life payments into Consolidated Billing.
- *Carrier Billing Adjustments* – Carrier billing adjustments are requirements that UCOP implemented. This project creates a separate transaction for adjustments to premium payments. This was a huge change to an extremely complex process whose implementation



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was date mandated. We will continue to work on this process in the coming months to simplify the data entry for Payroll and Benefits as well as the batch processing at month end.

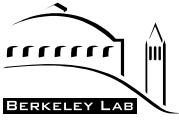
- *Termination Notification Pilot implementation* – Starting March 27th, a termination notification system for LDAP, IMAP email, Calendaring, Telephone Services, Unix and Novell accounts was implemented for a laboratory department on a pilot basis. The termination system automates the management of terminated employees' accounts via workflow. The supervisor is notified that certain accounts are due for deletion. The supervisor may elect to retain defaults provided or change account deletion dates. When account deletion date is reached, notifications to administrators are sent as trouble tickets within Remedy.
- *REMS upgrade* – REMS (Radiation Exposure Management) monitors employee and guest exposure to radiation sources at LBNL. This upgrade was the culmination of a year and a half project. It went live in early April. The system was upgraded from Oracle Forms 3.0 to ASP and web based Oracle Forms (6i). At the same time, the business practices were greatly streamlined and simplified resulting in a smaller but more functional system.
- *SAAR upgrade* – In April ISS completed design and coding of a new Supervisors' Accident Analysis Reporting (SAAR). This system tracks data on employee health and safety related incidents. The new system is web based, written in ASP, and fully integrated with the Health Services' Occupational Health Manager (OHM).
- *Maximo 4.1.1 upgrade* – Maximo 4.1.1 positions the Lab to utilize Maximo Projects, an integration of Maximo with Microsoft Project 2000. It is also the last planned client-server release. Release 4.1.1 is a required staging point for our planned upgrade to Maximo Release 5, MRO Software's pure Java-Java Server Pages Internet release of Maximo. Also included in 4.1.1 is Maximo customer self-service that enables access to work order information from web browsers. This feature is planned for implementation during Q4.
- *Maximo Safety and Hazards implementation* – Maximo Safety and Hazards function was implemented as a pilot and included the deployment of a reusable data propagation method for future building implementations. Equipment and work related hazard data was collected. Safety procedures and precautions were developed for these hazards. They include full "lock-out - tag-out" (LOTO) procedures. EH&S' HEAR location specific hazard data was included. Together this hazard data and their respective safety procedures and precautions were implemented consistent with the Laboratory's ISM (Integrated Safety Management) guidelines.
- *Web Survey Form development and implementation* – Developed and Implemented a fully customizable Web Survey form that can be used to perform various client surveys. Besides being customizable and database driven, the survey supports both anonymous login or LDAP login methodology.
- *Standard Web Interface Model development* – Developed a standard model that allows for uniform look and feel for all Web applications built by the IA group. The same model is used for both JSP and ASP applications and provides a robust, leading edge solution.

## Data Warehousing and Reporting

In the second quarter of fiscal year 2002 ISS upgraded and modified LBNL's Data Warehousing system in response to need from various levels of users (programmers, financial analysts, etc). In particular, IRIS (Integrated Reporting and Information System) was modified to incorporate Activity Based Budgeting, LBNL's new zero based budgeting activity.

## Infrastructure Management

ISS manages infrastructure on an ongoing basis, making improvements and upgrades as necessary. Accomplishments in the second quarter of FY2002 include:



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- *ISS databases evaluation* – Compared our Oracle versions with Oracle’s support/de-support information. Identified any risks associated with losing Oracle support for our older Oracle database versions.
- *Database upgrades* – Upgraded 16 databases to Oracle 8.1.7.1, including 3 production and 13 development databases. This moves us much closer to our goal of bringing all Oracle 8.x databases to version 8.1.7.1 (the terminal release of Oracle 8).
- *LDAP authentication alteration* – When a required Oracle security patch configuration “broke” our method of doing LDAP authentication for several databases, we designed and implemented an alternate LDAP methodology, which allowed us to then fully implement the security patch.
- *New client deployment* – The desktop delivery portion of the latest versions of HRIS, FMS, Maximo and AMS were released, affecting approximately 700 users. Oracle client updates were installed for compatibility with a new version of the Java Applet version of REMS.
- *LAN systems improvements* – Added additional servers and storage to provide additional archives for email storage, saving operations departments several thousands per month. Redesigned backup schedules to increase in storage requirements. Completed 80% of a security redesign for the standard NT web server.
- *Server upgrades* – Upgraded development storage server. Installed development firewall. Staged major new production server for hosting PRP production.
- *Java servlet environment creation* – Created a Java servlet engine environment for ISS to enable developers to write Java based web applications.