Price College of Business Information Technology Handbook

A Guide to the Technical Support Services and Resources in Price College

PCoB IT Team Price College of Business University of Oklahoma

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I. Introduction

A. Technical Support Mission

Information technologies have become mission critical to the success of classroom instruction, research activity, and administrative operations within Price College. This dependence, in turn, necessitates a technical support system capable of delivering the specialized services required by the diverse technical needs of the faculty and staff.

Price College of Business Information Technology (PCoB IT) provides technical support for the academic, research and administrative operations of Price College. The department is responsible for the planning, management, and implementation of the technology initiatives necessary to provide the college with a comprehensive and secure IT infrastructure, a dependable computing environment and delivering of essential help-desk services for faculty and staff.

The technical support provided to the college by PCOB IT can be broken down into the principal service categories listed below:

- Faculty and Staff Computer Support Services Designed and operates the Price College Help Desk, an automated, online service request system which receives and processes over 1,200 service requests annually.
- Classroom Technology Support and Training Provides routine and emergency technical support for all computer and multimedia technology installed in Price College classrooms and offers individualized training to faculty in the operation and uses of the technology.
- **Computer Lab Operations and Maintenance** Designed and installed computer system configurations tailored for use in a computer lab environment and retains operational responsibility for the more than 230 computers and assorted peripherals available for student and instructional use in four Price College computer labs.
- Virtual Computer Lab 150 virtual machines available for Price College students, faculty, and staff. Designed and configured to function as remote and auxiliary lab computers.

Each of these service categories generates an array of specialized operational, maintenance and service delivery duties. These are carried out by PCOB IT team. Although their assigned duties are concentrated within a particular service category, team members routinely draw upon one another's expertise for specific problem resolution.

We strive to maintain open lines of communication with faculty and staff so that we can quickly identify and rectify any IT problems which arise and to expedite the dissemination of the latest developments in computer technology and anticipate future technology needs of the college.

B. Purpose PCOB IT Handbook

PCOB IT *Handbook* was developed in response to the recognition for the need to assemble the procedures policies that guide our service delivery into a single source document for reference. The *Handbook* is also a valuable guide to the information and statistical resources and other technical resources available in the college.

PCOB IT *Handbook* will continue to evolve as our technical staff integrates new technologies into the College and adapt to the ways these new technologies will be applied by our faculty and staff.

II. Faculty and Staff Computer Support

A. Summary of Services

The Price IT is responsible for providing personal computing support to all Price College faculty and staff. The Price College Help Desk is online service request system and serves as the primary conduit through which faculty and staff request service, updates, and additions for their personal computers.

Personal Computer Support Services

- Acquisition, installation and maintenance of computer hardware
- Installation of operating systems, security patches and appropriate drivers
- Software installation, maintenance and troubleshooting
- Individual and network printer configuration
- Installation of antivirus software and virus removal

In addition, our technical staff assists divisions, centers and programs with the management of their technology needs. This assistance takes many forms and includes the following:

Technology Management Services

- Develop configuration specifications for computer purchases
- Surplus obsolete computer hardware
- Redistribution of replaced hardware
- Personal computer upgrades
- Maintain computer hardware and software inventory system
- Evaluation of new technologies

B. Price College Help Desk

The Price College Help Desk (Help Desk) is an online service request system designed and developed by PCOB IT programmers and is the principal conduit through which faculty staff request and receive support. A central feature of the Help Desk is the automatic prioritization of each request received by both the severity of the problem reported and the time the request was received. The Help Desk is located at http://pcbhelp.ou.edu/

Prioritizing help requests affords the following benefits:

- Ensures that the most serious problems are addressed first
- Provides a rational and efficient means to allocate support staff resources
- Helps keep service response time down to a minimum

The Help Desk is accessed with an Internet browser at <u>https://pcbhelp.ou.edu</u>. Links to the Help Desk are also located on the Price College web under "F/S IT Services" as a part of "Faculty/Staff Services".

B.1. Help Request Process

The Help Request process consists of three steps:

- 1. Logon to the Help Desk
- 2. Submitting the request
- 3. Checking the status of the request

B.1.1. Logon Instructions for the PCB Help Desk

To logon to the Price College Help Desk you must have an OU username (4 X 4) and password. If you do not know your OU username and password, please visit https://one.ou.edu and set up your New User account or call the IT Call Center (405) 325-HELP for assistance.

Logon procedures for PCB Help Desk:

- 1. Open your web browser to https://pcbhelp.ou.edu
- 2. Select the "Submit Help Request" button
- 3. A window will pop up to prompt you for authentication
- 4. Enter "sooner\your 4X4" as your user name
- 5. Enter your password
- 6. Click "OK"

B.1.2. Instructions for Request Submission on the PCB Help Desk

Once you are logged onto the Help Desk, you'll be presented with a series of questions:

- 1. Next, you'll be presented with a drop down menu asking for whom is the request
- 2. After choosing the appropriate user from the list, make a selection for the type of problem
- 3. After choosing the appropriate problem, select the type of issue
- 4. Next, complete any remaining selections and input a description of the issue. For example: "Local Printing Problem."
- 5. Finally, click the "Submit" button at the bottom

When submitting a help request, please provide as much detailed information as possible. This helps in the accurate classification of requests and provides information needed by our staff to successfully diagnose and solve your problem

Submission of the request initiates the following actions:

- 1. Once submitted, your request is classified as according to the seriousness of the problem. Classification occurs within twenty-four (24) hours of receipt.
- 2. Next, your help request is assigned a work order number and is placed in the Help Desk queue. It is then assigned to one of our highly trained Computer Technicians who is dispatched to your office to fix the problem.
- **3.** Upon successful resolution, the work order is closed.

B.1.3. Logon Instructions for Checking Request Status

Another feature of the Help Desk is the ability to check the status of your help request. The procedure for checking your request status is similar to the logon.

- 1. Open your web browser to <u>http://pcbhelp.ou.edu</u>
- 2. Select the "Check Request Status" button
- 3. A window will pop up to prompt you for authentication
- 4. Enter "sooner\your 4X4" as your user name
- 5. Enter your password
- 6. Click "OK"

C. Work Orders Related to Reformatting Hard Drive

- 1. Only computers that are being retired (surplused) will be "sanitized" in accordance with university policy
- 2. According to current Data Storage Policy, all work-related data must be saved on OU OneDrive. Therefore, all data could be potentially wiped with modern endpoint management. Users need to ensure that their data is backed up.

D. OU IT Computer Support

The University of Oklahoma also provides computer support services through the OU IT support staff. While the majority of computer-related problems that occur in Price College are properly referred to PCOB IT Team, there are situations in which the OU IT staff should be contacted first.

Situations include:

- 1. Problems accessing your Internet provider (OU, Cox, etc) from home
- Problems with Microsoft Outlook Microsoft Outlook mail resides on a Microsoft Exchange server at IT, and the TSC has specialists trained to help specifically with Outlook mail, tasks, calendar, etc.

For these problems, contact the OU Technology Services Center at 325-HELP.

III. Price College Network

A. Mission

A stable, secure and efficient operating environment is the corner stone upon which all computer applications in the College rely. The Price College of Business Network (PCB Network) links office workstations, computer lab workstations, and classrooms to each other and provides access to computer, communication and informational services both on and off campus.

B. PCB Network Technology Overview

The Price College computer network is housed, maintained, and operated by OU IT networking and PCoB IT. To meet the College's computer networking demands, PCOB IT operates 2 dedicated servers each with a different function.

C. PCB Network Servers and Functions

- 1. Print Manager Server Operates printing service for all Price College Computer Lab printers.
- 2. **Web Server** This server hosts the Price College web site. It also acts as the Microsoft SQL 2005 server and hosts assorted databases.

D. PCoB Network File Storage

The PCoB Network follows OU Data Policy guidelines to help users to utilize OneDrive and other OU approved could storage to provide:

- Temporary and permanent file storage
- Document management
- Increased data security
- Automated back-ups and file recovery
- Remote access of data files
- File sharing across the network

Data Category	Data Type	Safe on OneDrive?
A	Healthcare Data	With Approval
В	Payment Data	Ask Bursar
С	Student Data	Yes
D1	Confidential Research, Law Enforcement, DEA, DoD, ITAR	No
D2	Published&Unpublished Research, IP data, purchased datasets, OU Property	Yes
E	OU Admin & Financial Data, IT data, Employee Data, etc.	Yes
F	Publicly Available Data	Yes

E. New Price College Faculty and Staff

In order to take advantage of any OU computing resource including email, a new employee must first be assigned a personal OU UserID and then activate their OUNet account. Assignment of an OUNet ID is a prerequisite for connection access to the PCoB Network.

E.1. OUNet ID and Activating OUNet Account

The request for an OUNet is best initiated by the new employee's respective departmental secretary or department head by simply contacting OU IT either by phone or email to request assignment of the new employee's UserID (also referred to as a 4 X 4).

Once the OUNet ID is obtained, the next step is to activate the new employee's OUNet account.

To activate the account, follow these steps:

- 1. Go to https://one.ou.edu and click on "New to OU? Setup your OU account."
- 2. Enter your OUNet ID (also known as your "4+4") and your birth date (MM/DD/YYYY)
- 3. Answer five password questions (you will need to answer these questions if you forget your password in the future and need to reset the password)
- 4. Create a new password

OU IT recommends the following protocols be followed when creating and managing passwords:

Length of the Password

Minimum of 12 characters

Complexity of the Password

- Must contain at least one upper AND lowercase letter
- Must contain at least one numeral OR one symbol
- Must be changed at least every 365 days
- Cannot be the same as your previous six passwords
- Cannot contain the words boomer, sooner, qwerty, or password
- Cannot contain your name, HSC Username, or OUNet ID (ex. Jane Doe would not be able to use "jane", "doe" or doe0023)

Changing Password

Change your password every 360 days (12 months) to a new password

F. OU Faculty-Staff Web Server

There are two options for those Price College faculty and staff members who wish to publish personal web pages:

Price College faculty and staff members can publish their personal web pages via Create.ou.edu. Instructions on how to create web pages and publish them to this web server can be found at Create.ou.edu.

To Activate Create Webspace:

- Go to https://create.ou.edu/new-login-page/ (opens in new window).
- Log in using OUNetID and password.
- Now follow the onscreen prompts to create your sub-domain or domain address. Note that sub-domains are free for OU students, faculty and staff. Custom domains can be acquired through the site for \$12/year.

Unfortunately, PCOB IT does not have the necessary resources to create or edit personal web pages Price faculty and staff. We can, however, act as consultants to answer specific questions you might have.

G. Network Share Best Practices

PCoB IT would like to stress the importance of redundancy. It is highly recommended to keep important files in a minimum of 2 locations. When working on a document that is on a shared drive please follow these steps when editing:

- 1. **Copy** the file to your computer (Desktop, Documents...)
- 2. Edit the file that is on your computer
- 3. **Copy** the modified file back to the network location and either save it as a new document or replace the existing document

Following these steps ensures the file is in at least 2 places as well as limiting the risk of file corruption.

IV. Price College Classrooms Technology

A. Mission

The integration of computing and audio-visual technologies into the instructional process has become the norm in Price College rather than the exception. We recognize that it is critical that our classroom technology always operates at 100 percent. PCOB IT aims to provide a problem free instructional environment.

B. Classroom Technology Overview

Price College maintains general purpose classrooms, conference rooms, presentation rooms, and study rooms. Price Hall classrooms employ the Crestron AV control system to manage multimedia capabilities.

B.1. Standard Classroom Multimedia Equipment

- Projection system
- Desktop computer
- Document camera
- Connection for instructor device

B.2.Standard Classroom Software Build

- Google Chrome
- Microsoft Edge
- Microsoft Office
- Microsoft Visio
- Microsoft Project
- SAP GUI
- SAS
- SPSS
- SQL Server Management Studio

Price College faculty may request installation of specific software applications to meet their instructional needs. Requests should be submitted through the Help Desk 2 weeks prior to the start of a semester. A valid copy of the software license is required prior to installation and remains on file. Installation codes or other instructions for installation of specialized software are required.

C. Classroom Technology Support

PCOB IT is responsible for the operation and maintenance of all technology installed in Price College classrooms, special use rooms, presentation rooms, and conference rooms. Classroom technology support is divided into two primary categories; routine support and maintenance and emergency support.

Routine support and maintenance includes:

- Creation and installation of computer image for all classroom computers
- Disposition of classroom work orders submitted via the PCB Help Desk
- Special classroom equipment set-up requests
- Weekly, preventive troubleshooting of all computing and audio-visual technologies in all Price College classrooms
- On-site support staff ready to respond any time a class is in session
- Ongoing technical education for support staff

Emergency classroom support includes:

- Call 405-325-4476 for classroom assistance.
- On-site support staff ready to respond any time a class is in session

C.1. Logon Instructions for Classroom Computers

Use your OUNetID and OUNetID password with the following procedure:

- Username: USER#### (your OUNetID)
- Password: (your OUNetID password)
- Domain: Sooner (automatically set by Windows)

If you have any questions or need additional information about the classroom computers are any classroom technology contact Greysen Jackson at <u>Greysen.O.Jackson-1@ou.edu</u>

D. Classroom Technology Training

In addition to support services, PCOB IT offers individualized training for all classroom technology to any faculty assigned to a Price College classroom. Printed instructions are posted at each station to provide an on-site user reference.

Individualized training: Price College of Business IT Department (office365.com)

E. Reporting Classroom Equipment Problems

Report any routine equipment problems by submitting a request to the Help Desk. Emergency problems are handled by contacting the Student Assistant on duty in 105F at (405) 325-4476.

F. Classroom Equipment Overview

Adams Hall classrooms 100, 101, 104, 112, 150, 255, 3103, 3106, 3107, 3109, 3208 and 3210 are equipped with:

- Desktop computer
- Dedicated document camera

- BYOD Capable
- Sound capabilities.

Price Hall classrooms 2010, 2020, 2030, 2040, 3010, 3020, 3030, 3040, and 3065, are equipped with:

- Dedicated computer
- Dedicated document cameras
- BYOD Capable
- Audio conferencing abilities
- Sound capabilities

The multimedia equipment in Price Hall classrooms is controlled by the industry standard Crestron AV control system.

G. Special Use Rooms

Price College provides special rooms designed to accommodate meetings, presentations, and group study. These rooms are restricted to Price College related use only. Study, presentation, and conference room reservations are submitted via their respective online reservation systems.

G.1. Study Rooms

Rooms 2036, 2047 and 3047 in Price Hall are designated as Study Rooms for use by Price College students, faculty, and staff. These study rooms are available for two hour time blocks and must be reserved in advance. Reservations are made online using the Price College Study Room Reservation System developed by PCOB IT programmers.

- Price College faculty and staff who wish to reserve a Study Room should go to: <u>http://pcbfaculty.ou.edu/studyroom/faculty_help.aspx</u>
- Price College students who wish to reserve a Study Room should go to <u>http://pcbfaculty.ou.edu/studyroom/login.aspx</u>

G.1.2. Price College Study Room Reservation System Logon Instructions:

- 1. Open your web browser and go to http://pcbfaculty.ou.edu/studyroom/faculty_help.aspx
- 2. Click on the "Faculty/Staff Logon" button at the top right corner
- 3. A window will pop up to prompt you for authentication
- 4. Enter "your 4X4" as your user name
- 5. Enter your password

If you receive an error while attempting to logon, please first check to see if the logon information is typed in correctly and that the Caps Lock is not on. If the problem persists, please call PCoB Tech Center at 325-4476, or come to Adams Hall 105F for assistance.

G.2. Conference Rooms

Rooms 1046, 2005, and 3046 in Price Hall are designated as conference rooms. Rules governing the use of these rooms are the same as for study rooms with the following exceptions:

- 1. Price College faculty and staff may override student reservations
- 2. Room 2005 in Price Hall must be reserved through the Dean's Office
- 3. Room 1046 in Price Hall is dedicated solely for Price College faculty and staff use

G.3. Dean's Conference Room

Room 2065 is significantly larger than other conference rooms. Use of this room must be approved through the Dean's Office.

Equipment installed in the Dean's Conference Room includes:

- Dedicated desktop computer
- Dedicated document camera
- Mersive Wireless Connection
- Audio and video conferencing capabilities

G.4. Presentation Rooms

Price College has two (2) presentation rooms for student use. One of these presentation rooms is contained within the Business Communications Center (BCC). Reservations for this room must be approved through BCC Director (325-5595). The second presentation room, room 2012, is managed by PCoB IT.

Each of these presentation rooms includes:

- Equipment in both Presentation Rooms includes:
- Dedicated Desktop computer
- VGA projector
- Laptop connections
- Audio and video conferencing capabilities
- *Room 2012 has a dedicated document camera.

V. Price College Computer Labs

A. Mission

Price College Computer Labs provides a teaching lab, trading lab, and a virtual lab for use by Price College faculty, staff, and students.

B. Standard Computer Lab Software Build

- Google Chrome
- Microsoft Office
- Microsoft Visio
- Microsoft Project
- SAP GUI
- SAS
- SPSS
- SQL Server Management Studio
- Visual Studio

C. Computer Lap Operations

The lab software compliment is reviewed prior to each semester; any software needed by the faculty for instructional purposes should submit their request to the Help Desk.

PCoB IT is responsible for the operation of all Price College Computer Labs and also provides technical support,

Computer Lab Support

- User's can access computer lab support by calling 405-325-4476
- Installing, updating and maintaining relevant hardware and software in all labs
- Computer labs can be reserved by contacting Garrett Hollingsworth (ghollingsworth@ou.edu)

C.1. Computer Lab Hours

Lab hours are posted on the Price College web site under "Computer Labs" at Computer Labs (ou.edu)

Hours may be extended during the last two weeks of the fall and spring semester or adjusted for the summer semester and intercession to meet the needs of the instructors and students.

C.2. Computer Lab Logon Procedure

Students logon to PCB lab computers by entering their OUNetID (first 4 letters of their last name + last 4 numbers of their student ID). New students may go to http://acounts.ou.edu to activate a new account, change account preferences, and change their OUNetID password.

C.3. WEPA Printing

OU Information Technology offers campus-wide cloud printing services to students, faculty, staff, and visitors. <u>Service - WEPA (ou.edu)</u>

D. Laptop Check-out Program

The Price College Student Laptop Program provides laptops to students enrolled in a Price College class. A total of 15 Dell Latitude laptop computers are available for check-out from Room 105F in Adams Hall.

- Students enrolled in PCB class
- Check-out available for entire day.
- Restricted to Price and Adams Hall

Confirmation of Price College enrollment is made through the Price College Student ID Check, an online application developed by PCOB IT programmers.

VI. Computing Hardware Purchasing and Deployment

A. OU Computer Standardization Policy:

OU Board of Regents approved Computer Standardization Policy:

University computers *must be purchased from OU's published Computer Standards List*, which includes standard vendor models, hardware configurations, recommended lifecycles, and use cases. Exceptions must follow the Standard Computer Equipment Exceptions process.

One Computer Per Employee This policy allows University funds to be used to purchase one (1) desktop computer or one (1) laptop with docking station and external monitor, as necessary, per employee. Users will be eligible to replace this computer at the end of the lifecycle documented on the Computer Standards List or if the computer malfunctions and cannot be repaired or replaced through a warranty claim. Additional standard computers may be purchased for a single employee using externally derived research funds. Requests to use internally derived research funds to purchase additional computers for a single employee must follow Non-Standard Computer Equipment and Inventory process, as these funds often share accounts with other funding sources.

B. New Computer Ordering Process

PCoB IT attempts to stay informed on current and emerging technologies and is qualified to advise faculty and staff regarding hardware purchases and are trained to install the computing hardware. For all new computer orders, we ask that you submit the system configuration for PCoB IT review so that we can rule out potential compatibility or connectivity issues between the computer and PCoB systems and software.

There are two approaches to the purchase of new computer hardware.

The first and the fastest approach is to order a standard computer that is available at OU IT warehouse. On it.ou.edu, click on Services & Support \rightarrow Service Catalog and then select the Standard Computer Request under the Featured column. The direct link is:

<u>https://itsupport.ou.edu/TDClient/35/Norman/Requests/ServiceDet?ID=317&SIDs=2854</u>. Click on the "Order Form" to fill out and submit the request.

The second option is to work with the technical staff of PCoB IT and jointly develop a system configuration fitted to your particular computing needs. To begin this process, submit a consultation request to the Help Desk.

When the system configuration is complete, submit a finalized request to the Help Desk requesting a specification worksheet along with pricing information.

Please include the following information in your request:

- Name of the person the computer will serve
- Primary purpose of the computer
- Location at which the computer will reside
- Amount allocated for the purchase
- Any required peripherals, i.e. Webcam, Microphone, etc.

Once the configuration is finalized, PCoB IT will assign the cart to a F&O staff to get the computer ordered.

B.1. New Computer Setup Procedure

The New Computer Setup Protocol developed by PCOB IT is the first step in assuring that every new computer workstation meets standardized performance criteria Procedure

- 1. Confirm computer name and domain as follows:
 - a. If Desktop, D or if laptop, L + Servicetag = DSERVICETAG
 - b. Domain: sooner.net.ou.edu
- 2. Add to Active Directory in Appropriate PCB Group
- 3. Run windows updates
- 4. Add end user as administrator
- 5. Installation of requested and standard software
- 6. Delivery and on-site installation

B.1.1 Non-Standard New Computer Setup

- 1. Apply base or more relevant image
- 2. Follow standard steps after imaging

B.2 Standard Software Build for PCB Workstations

PCoB IT has developed a standard software build for personal workstations. This standard build is installed on each new computer received into Price College.

- Adobe CC
- Google Chrome
- MS Edge
- Microsoft Office
- Crowdstrike
- Most Requested Additional Software
- SAS
- SPSS
- STATA

C. Peripherals

The most frequently purchased peripherals are:

PCoB IT has dealt with many manufacturers and is positioned to provide expert recommendations on what peripherals to obtain for a given situation.

Please be aware that purchase of printers and copiers should be coordinated through OU Printing Services. By following OU Printer policies, PCoB IT cannot perform repair services on any printers.

D. Software and Database Acquisition and Support

This section summarizes the major database and software applications maintained and supported by Price College. Price College has database and software licensing agreements for a variety of applications available for use the Price College faculty and staff.

D.1. Network Installed Databases

The following database packages are run partially or wholly from our network.

Other software applications, often referred to as "shareware" are available in the public domain while still other applications are licensed for sale through the OU IT Store at discounted prices. To get the most updated list, usage, and contact information of the research database, please logon to the following website: https://pcbfaculty.ou.edu/ResearchLogin/

D.1.1. Center for Research in Security Prices (CRSP)

The Center for Research in Security Prices files cover common stocks listed on the NYSE, AMEX and NASDAQ Stock Markets, US Government Treasury issues, and US Mutual Funds. The Center has a wide variety of financial and economic indices and other statistics used to gauge the performance of the broader market and economy in general. CRSP also provides proxy graphs for 10K SEC filing, monthly cap-based reports and custom data sets and extractions.

D.1.2. Economic Literature Database (ELDB)

ELDB contains 250,000 bibliographic references from 465 leading journals of economics, finance, accounting, insurance and real estate. Author, keyword in title, journal or year, can rapidly search ELDB's exact bibliographic references. Search, narrow and delete routines allow for Boolean logic searches.

D.1.3. Fixed Investment Securities Database (FISD)

FISD is the most comprehensive collection of publicly offered U.S. corporate bond data available. With the FISD database, you can obtain up-to-the-minute changes that affect bond pricing. Uses of FISD include: Research, Corporate Finance, Back Office / Compliance, and Trading Desk.

D.1.4. SAS

SAS provides data analysis, report generation, and enterprise-wide information delivery. To have SAS installed on your office computer, submit a request to the Help Desk.

D.1.5. SPSS

Features include an in-depth data access and preparation, analytical reporting, segmentation and predictive modeling. Submit a request for installation on OU owned computers to the Help Desk. Installation on privately owned computers is available only to FTE University of Oklahoma faculty and staff.

D.1.6. Capital IQ

Capital IQ delivers comprehensive fundamental and quantitative research and analysis solutions to over 4,200 investment managers, investment banks, private equity funds, advisory firms, corporations, and universities worldwide. Capital IQ may be accessed from any machine in the Business Information Computational Laboratory.

D.1.7. Eventus

A financial research, education and consulting software, Eventus performs state-of-the-art event study estimation and testing using the CRSP stock database or other stock return data and provides fast event-oriented data retrieval from the CRSP stock database.

VII. Software Purchases and Installation

If you would like to purchase software not offered by PCB or OU, a security assessment needs to be completed before sending the order to F&O <u>https://itsupport.ou.edu/TDClient/35/Norman/Requests/ServiceDet?ID=64&SIDs=626</u> Click on "Request Service" on this page.

Contact PCoB IT if you have questions on the security assessment form, or for a software consultation to ensure all PCoB Faculty and Staff have the tools they need.