TO: The University Community

FROM: Compass Executive Committee

Michael Mandl, Executive Vice President, Finance and Administration
Edie Murphree, Vice President, Finance
Peter Barnes, Vice President, Human Resources
David Wynes, Vice President, Research Administration
Richard Mendola, Vice President, Information Technology & CFO
Ronnie Jowers, Vice President, Health Affairs
Jimmy Hatcher, Chief Financial Officer, Emory Healthcare
Charlotte Johnson, Senior Vice Provost for Administration
Larry Cain, Senior Director, Compass Product Support
Brett Coryell, Deputy Chief Information Officer, University Technology Services

DATE: March 3, 2010

RE: Compass (PeopleSoft Financials)

Effective September 1, 2009 Emory University went live with PeopleSoft Financials (Compass). PeopleSoft Financials is widely used in higher education and was implemented at Emory to replace the previous Financial Accounting System (FAS). Continuing with FAS was not an option for several reasons: it was a 20+ year old, heavily customized system that could not be modified to meet Emory’s contemporary business requirements; it lacked vendor support, thus putting financial operations at an unacceptable risk; and its poor documentation and outdated technologies made the possibility of system failure a significant risk to Emory. Looking to the future, it is clear that having a single financial system that spans all of Emory University and Emory Healthcare and is integrated with our PeopleSoft Human Resource and Student (OPUS) Systems will create efficiencies for many years to come.

We thank you for the commitment you are making to learn these systems. The Compass Executive Committee and senior leadership at the University are very cognizant of the additional pressures that the implementation of Compass has added to the normal responsibilities of our staff and faculty. We have heard your concerns about data integrity, processing workflow, report
availability, and information accessibility. And while we can not eliminate the disruption associated with changing established routines and in learning new ways of getting information, the Compass production team is committed to fixing “bugs,” ensuring data integrity, and continuing the development of additional training tools. We ask that Emory’s managers, faculty and staff continue to be patient as we resolve operational issues within a priority ranked system. At the same time, we have developed additional training to demonstrate how Compass can be used to meet your business needs.

To that end, Emory provides the following training for staff:

- The Compass Online Reference Guide that is the first online tool to use for step-by-step help (http://compass.emory.edu/training/Compass%20Reference%20Guide/General%20Ledge\r.pdf);
- A Compass focused grants class that will specifically cover how to manage grants using the Compass system and available reports. Further information on this class will be provided in the March Research Administration at Emory Newsletter, which will be available at http://www.osp.emory.edu/communication/newsletter/index.cfm;
- Instructor-led classes (A total of 66 hours of Reporting Basics and Accounting Basics classes are offered now through March 31 and continue on a regular basis. More sessions will be added in March and April. Enrollment is available through the Human Resources Self Service system.);
- Twenty-four on-line courses, which include printable quick-reference job aids for users (http://compass.emory.edu/training/index.html) and
- Instructor-led departmental training on request.

These courses and services are designed to ease the transition to Compass. Emory’s leadership fully expects all staff who use Compass to avail themselves to the level of training they need to fulfill their job responsibilities. Learning the new system will take a good deal of time and effort on all of our parts. Managers should give priority to staff training and allow staff the opportunity to enroll in the extensive portfolio of Compass training classes. For additional information on these training programs, please contact Charles Walker, Director, Finance Training and Communications at charles.walker@emory.edu.

Again, we greatly appreciate your continued patience and cooperation as we convert to Compass in order to ensure business continuity for the decade ahead.

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