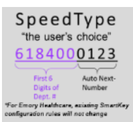
Compass 9.2 Changes by Module

Key Changes by Module

The changes highlighted below are by no means all of the changes taking place with the Compass 9.2 Upgrade, rather a subset of major changes we thought would be most relevant to you and your teams

SpeedType



As part of the Compass upgrade, we are replacing the current Compass SmartKeys with PeopleSoft delivered functionality called **SpeedType**. SpeedType is a "short-cut" tool to provide a shorter entry key than the full 57 digit ChartField string.

Pain Points:

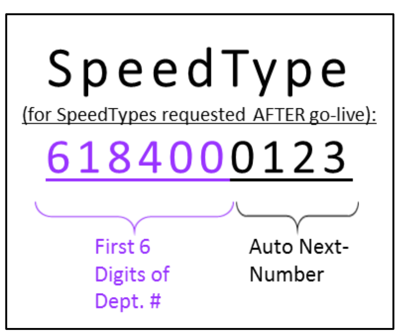
- SmartKeys have no logic and are therefore not a "smart" key.
- SmartKey is not a PeopleSoft tool. It is a 3rd party interface that sits on top of PeopleSoft.
- SmartKey is costly based on fees incurred and prevents ability to apply updates/patches.

Key Solutions & Benefits:

This change will enable Emory to benefit from similar "shortcut key" functionality and will allow us to take advantage of ongoing updates previously unattainable. The SpeedType will be used when entering transactions into Compass much like SmartKeys are used today. The difference is that the SpeedType numbering convention has changed:

- The new SpeedType schema include the first **6 digits** of the **Department**.
- This configuration will be effective for **new** SpeedTypes requested after Go-Live.
- Current SmartKey numbers will still be the post-Go-Live SpeedType number.
- There will be additional training prior to Go-Live.

The New SpeedType Format



For Emory Healthcare, existing SmartKey configuration rules will not change

Travel & Expense

The existing 9.0 Expense module has the second highest number of customizations and has one of the largest user bases of all the Compass modules. The team captured **31 Listening Tour items** specific to the expense entry interface.

Pain Points:

Expense users raised the concern that there are too many clicks or 'drill downs' required to populate an expense transaction. Multiple Listening Tour Items specific to Expense Entry included:

- Too many clicks to get to the accounting detail
- Not enough location information (e.g., line level location)
- The need to simplify populating attendees on an expense report

Key Solutions & Benefits:

- A redesigned and streamlined Expense Entry screen is delivered in PeopleSoft 9.2 that addresses many user concerns. The flatter screen will be more intuitive and include expand and collapse capabilities to display more or less information based on user need.
- Account is now controlled by the Expense Type selected. This simplifies the entry process and prevents the use of incorrect accounts that require GL Journals to re-class. Travel-related accounts are better aligned between University and Emory Healthcare to facilitate cross-charging expenses.
- A new custom Expense Report Summary that includes additions to the Entry screen along with the Accounting Summary for the Expense Report.

General Ledger

There are expected changes to the look and feel of the new 9.2 environment; however, the Journal Entry process is not changing much other than seeing a field named *SpeedType* instead of *SmartKey* for new journal entries. Journals will be included in the new Unified Workflow routed by Department, and will include approvers from all impacted Departments.

A new tool called the Journal Mover that will dramatically simplify the process to perform a bulk journal reclass. The engine will create all of the necessary debits and credits. This process will be easier than creating a traditional Journal Entry via the delivered Journal Entry pages.

Current Limitations:

- Much of the data reclass today results from Grant transactions that need to be reclassified due to Fund Code corrections, cost transfers, and cost sharing.
- The *Grant Out of Bounds Corrections* is another type of correction necessary due to transactions attempting to charge a grant after the allowable project window has closed.
- Details of current reclassification or correction entries are currently lost, and not easily traceable in the data warehouse reporting.

Key Solutions & Benefits:

- A new custom Journal application (with the ability to move Journal entries including detailed data) from existing ChartFields to new ChartField strings will be available.

	• The tool allows users to search for eligible transactions to move (using ChartFields or SpeedTypes), easily select transactions to move, enter the destination SpeedType and create a new journal entry.
Grants Grant Management	There are quite a few changes within the Grants module that will help streamline work, help users locate information for proposals and awards more easily, and expand visibility for notification of awards. The key changes by topic are highlighted below: **Award Set-Up** **Current Limitations:** • The award setup process is spread out over multiple navigations and completed by various offices/areas with disparate manual checklists and notifications within the process. • Checklists are routed manually or via email with little visibility into the status of the award. **Key Solutions & Benefits**: • A new custom entry page for each office that feeds into the PeopleSoft tables. • Form Builder functionality within PeopleSoft to streamlines checklists and sets-up contracts/bill plan to notify RAS the setup is ready for review. • New workflow functionality routes automatically and creates better visibility into progress status outside of just the sender and/or recipient. **Grants Portal** Emory will utilize new PI Portal functionality and maintain the customized 'Grants Quick View' pages. **Current Limitations:** • Lack of integration that allows drill downs from an award to project to transactions. **Key Solutions & Benefits**: • Utilize the PI Portal and remove the customized "grants quick view" pages. The PI Portal offers users the ability to drill down from an award to a project and then to the transactions. **Electronic Notification of Award (eNOA)** **Current Limitations:** • A third party system is used to store electronic notice of award and agency documents. • Security is maintained by the ORA technical group and is based on department name.

- Visibility to the eNOA is limited to the primary department, so if another department has an associated project with funding, they are dependent on the primary department to send them a copy of the eNOA.

Key Solutions & Benefits:

- eNOA's are now located in a PeopleSoft integrated system called OnBase so users have one location to navigate to, and everyone will able to view the eNOA.
- Primary departments will no longer have to forward eNOA documents to other associated departments.

<u>Fund Code Fringe</u>

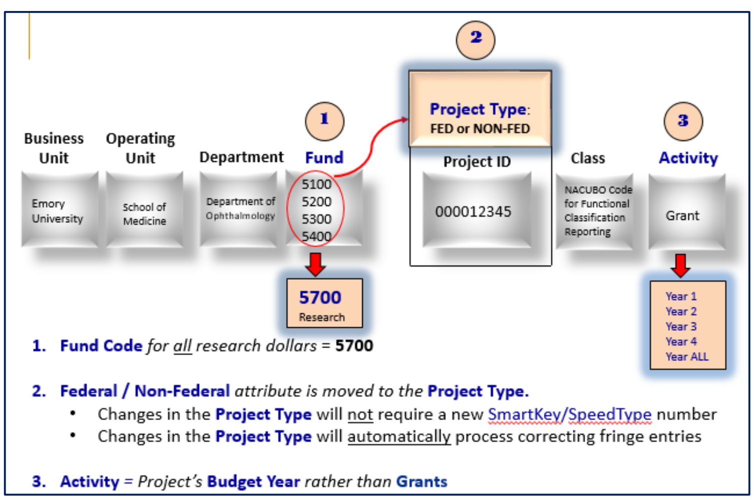
Current Limitations:

- Currently, Grants has four fund codes (5100-5400) representing agency funds received. Federal and Non-Federal is imbedded within the Fund Code.
- Federal and Non-Federal is imbedded within the fund code and was the source of a high number of corrections from initial setup errors or needed designation changes.

Key Solutions & Benefits:

- Project Type field now designates Federal or Non-Federal grants at the individual project level.
- There is one designated fund code (5700) to represent research funds.
- New Chartfield changes will reduce transaction level corrections and cost transfers that departments have to complete due to initial setup errors or designation changes.
- Project Type changes will trigger an audit trail process which automatically creates the necessary fringe adjustments without user intervention.

Fund Code Fringe Chartfield Changes



Activity ID

Current Limitations:

- Currently, Activity ID chartfield is used; however, only one value of “GRANT” is used across all sponsored projects.
- To segregate money across budget periods, users have to create a new Project ID with the same Activity ID of “GRANT”.
- This practice requires users to rely on dates and project descriptions to determine the project’s award year, as well as, the purpose of the award.

Key Solutions & Benefits:

- Activity ID field will now represent the Budget Year. This eliminates the creation of new Project IDs to separate budget periods when there is no carryover.
- Grants with carryover authority will have one Activity ID to represent the entire 5 year award segment.
- Allow users to tie the years of a project together with Project ID, and segregate when appropriate by viewing the Activity ID.

Reports

Emory University uses most of the PeopleSoft reporting functionality such as: Query, nVision, SQR, Crystal Reports and BI Publisher. The Emory Business Intelligence (EBI) is another tool that the Compass users have available to them. The EBI tool is the recommended method to retrieve Compass data for campus end users.

Current Limitations:

- There were numerous unused queries, nVision and Crystal/BI publisher reports developed from the original Compass implementation in 2009 to now.
- Users have expressed frustration as to which query or report they should use to obtain the information needed.

Key Solutions & Benefits:

- Optimize the efficiency for our users using reports by:
    - Deleting private queries that are no longer needed
    - Removing the queries/reports no longer used
    - Retrofitting queries/reports for new Compass functionality
    - Creating new queries/reports needed to support new Compass 9.2 functionality
    - Documenting query functionality to help users select the right query to meet their needs.
    - Standardizing the naming convention of queries

Transition Support

A goal of the Transition Support team is to provide Compass users with access to resources and assistance just-in-time. Users need to be able to access information directly from a particular screen with relevant help files. PeopleSoft 9.2 has the ability to imbed information within specific pages. This functionality is called Related Content.

Related Content

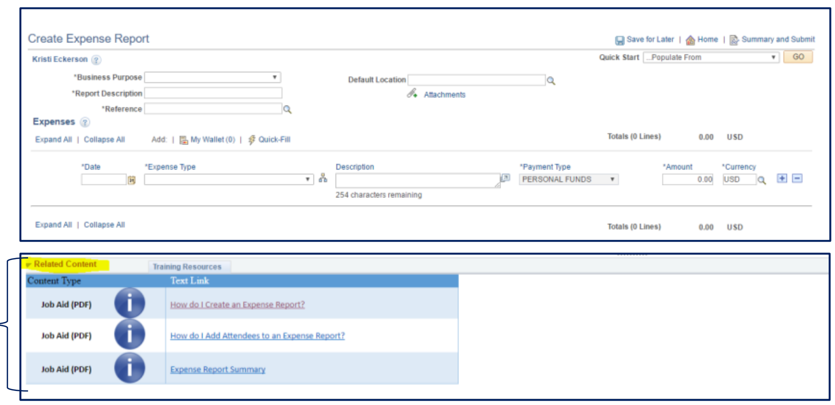
Current Limitations:

- Inability to locate resources within the Compass application. Users become frustrated when they are in the Compass application and need to search external sources to find assistance.
- Users prefer access to different types of methods for learning (e.g., step-by-step guides, videos, etc.).

Key Solutions & Benefits:

- Training Related Content was developed to provide just-in-time assistance relevant to specific pages within Compass (e.g., creating an expense report). Training content will be located in the most critical areas.
- Users will have options (where applicable) to access various types of help (video or job aid).
- Users will have integrated links that allow training content to open in separate tabs so they do not lose their place in Compass and can follow along more easily.

Related Content



WorkCenters

WorkCenters are new portal-like pages in Compass that provide a more streamlined and intuitive navigation to various Compass menus. WorkCenters help aggregate tasks, processes, and reports into a one-stop-shop experience. There's one WorkCenter dashboard per module (one for AP, one for GL, etc.).

Current Limitations:

- Users spend a lot of time navigating to specific pages, locating information, and performing specific tasks.
- Users have to keep drilling down to multiple pages and open windows to access the data they need.
- Users rely on multiple pages, reports and tools inside and outside of Compass to manage their "To Do" list.

Key Solutions & Benefits:

- WorkCenters functionality now available in the PeopleSoft 9.2 environment reduces navigation, and the number of clicks necessary to locate menu functions. This will enable a centralized view of transactions requiring attention, and provide quick access to Reports and Queries.

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<td>Workflow</td>
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Workflow is the tool that allows transaction approvals to be performed within the Compass system. The new Unified Workflow solution provides additional flexibility, visibility and consistency to improve the workflow process and increase efficiency.
Current Limitations:

Online Journal Entries and Budget Transfer Journals route differently from Accounts Payable and Expenses.
Online journal entries route and post without all of the affected departments having visibility into the dollar amounts that will hit their departments.

Key Solutions & Benefits:

Workflow Routings will be based on Department.
New role for an Accounting Checker and project-level approvers will be available to help with accounting accuracy and transaction validation at system entry points.
There will be flexible dollar-level approval assignments.
Transactions are visible to all affected Departments.

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