Our format has changed! In response to requests to reduce the number of emails related to the upgrade, we will consolidate the various communication streams into one weekly email called ‘The Compass Readiness Checklist’. Our goal is to help users clearly understand and complete their personal path to Go-Live while also being aware of activities performed by others.

This checklist will be sent weekly as we start the countdown to Go-Live. The various work streams will be in highlighted sections and the content will be limited to important information and action items. Review the Audience Impacted column to see which areas pertain to you.

<table>
<thead>
<tr>
<th>Summary of Content:</th>
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<tbody>
<tr>
<td>TRAINING</td>
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</table>

The Compass Readiness Checklist is targeted for University Compass Users. Healthcare users have unique training and UAT requirements. Specific Healthcare questions should be directed to Lori Ronalder

The Compass Readiness Checklist

August 10, 2016

T-14 Weeks to Go-Live

<table>
<thead>
<tr>
<th>AUDIENCE IMPACTED</th>
<th>TOPIC</th>
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<tbody>
<tr>
<td>TRAINING*</td>
<td></td>
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</table>
**REGISTER for Classroom Training.**

- If your Learning Plan includes classroom or webinar course training, register now!
- Select dates and times that work with your schedule

[Click here to get step-by-step instructions on how to register](#)

**COMPLETE the Institutional Data Management (IDM) eLearning Course**

- All Financial system users (including Compass, EPEX, Emory Express and EBI) with access to create or use University data must be in compliance with Emory Policy 10.13 prior to October 31, 2016. The IDM course is required for you to have any access at all to Compass.* You will NOT have View or Transactional access to any modules at Go-Live without completing this course prior to October 31. For more background information on data management policies please click [here](#).

**ATTEND Compass Essentials 9.2 Webinar (Recommended but not Required)**

- **When is it?** Live one-hour webinars are scheduled for August 16th, 17th and 18th
- **What is covered?** Key changes that impact all Compass users including: Navigation changes, SmartKey/SpeedType, Reporting and a demo on how to register for training.
- **How do I sign-up?** Register through the [Emory ELMS](#) (Course Title: Compass 9.2 Essentials Webinar, Course Number: 260462). The session will be recorded and available in the ELMS.

*Healthcare will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact [Lori Ronalder](#).*

**Compass eLearning Courses Coming Soon!** Check the [Weekly Readiness Checklists](#) to find out when the eLearning course are available on the ELMS. Click [here](#) for a complete list of courses.

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**USER ACCEPTANCE TESTING**

**Reminder to Get Out and Play!**

1. **CREATE your own transactions**
   - [https://fsclone.emory.edu](https://fsclone.emory.edu)
   - (Use your own log-in and password.)

2. **PROVIDE feedback on your experience via Survey Monkey**
Onbase is upgrading their systems to support additional internet browsers and browser versions before we go live with Compass 9.2. The week of August 8th–15th, the OnBase testing environment will be unavailable. If you have any questions please contact Shannon Swoope at skhoffm@emory.edu.

### What is User Acceptance Testing (UAT)?


**Key Survey Results (Cumulative)**

82% of respondents are confident they will be able to perform their specific job functions at Go-Live based on their UAT experience.

74% of respondents think there will be at least slight time savings in performing related job duties with this new functionality.

82% of respondents felt that the hands-on lab experience has increased their comfort level with the new Compass environment.

*Healthcare Compass Users: If you have any questions related to UAT, please contact Lori Ronalder.*

### REPORTING

#### WHAT HAPPENS TO PRIVATE QUERIES AT GO-LIVE?

All Private Queries needed after the Upgrade need to be renamed with a “PQR_” prefix. Many of the private queries were renamed by users over the past year but just being in the “upgraded” system does not mean the query works the way you may expect. *Note: Security*
was changed to ensure that only those with the query training and skillset could make changes to their Private Queries.

WHAT DO I NEED TO DO?

If you are a user who has Private Queries in either Production or Reporting, whether or not they were renamed with the “PQR_”, you should:

1. **Ensure that any queries** renamed that are in the test system are working as expected
2. **Inform us** if you did not rename all the Private Queries you will need after the upgrade.
3. **By Friday, August 19, complete a survey** designed to help plan to meet the needs of all Private query users prior to and post Go Live. The upgrade reporting team will compile the survey responses and form a strategy to meet Private Query needs.
   - To log into the survey in Survey Monkey, click this link: [Private Query Needs for Compass Upgrade](#)

WHO DO I NEED TO CONTACT IF I NEED HELP?

If you have any questions, please contact us at em_rptofficer@emory.edu, or contact Larry Goldberg at Larry.Goldberg@emory.edu or 404-727-2464.

MEET A PEER EXPERT – Rita Tiller

All Users

How many years have you been at Emory? Five
What divisions/business units have you worked in? Since I began working at Emory I have been at the Yerkes National Primate Research Center in the Division of Microbiology & Immunology.
What activities have you participated in as a Peer Expert that you believe will be most helpful to you in supporting your colleagues? I have found the UAT Volunteer Classes to be very helpful. We hear many of the same questions asked in multiple classes. This suggests these same questions will be raised by our colleagues in actual work situations, and we will be prepared to assist them.
What advice do you have for other Peer Experts based on your experience? Volunteer! Don’t be afraid to volunteer due to your inexperience. We are all learning, so keep asking questions. Sign up for the labs and attend classes more than once, if needed.
What are some benefits to you being in the Peer Expert role? I am beginning to feel quite comfortable with many aspects of the Compass 9.2 Upgrade. The training has been thorough, and the experience has been enjoyable. I have enjoyed working with the Compass Upgrade Team and meeting new colleagues within the Emory community.
Favorite word? Contentment
Summer vacation adventures? I love to spend time in Costa Rica. I’ve been traveling there for the past 15 years and love the tropical climate and diversity of the rain forest and beaches. Getting to know you: My husband and I have a 7-acre farm where we have raised three sons and everything from horses to pea fowl.

What is a Peer Expert?

Peer Experts provide “hands-on” feedback related to training and testing. They help answer user questions during and after training.

Peer Experts will share their technical knowledge of the Compass Upgrade within their business units and departments and increase overall end-user comfort level with the upgraded Compass tool.

Visit the website to see who the Peer Experts are in your division.

For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact compassupgrade@emory.edu