The meeting will start momentarily. Sound will be enabled once the meeting begins.
Compass Outreach Sessions

Purpose:
To engage the Emory community and provide information on the upcoming changes to Emory’s financial system: Compass.

Compass PUM (coming early 2018)

Topics:
PUM vs. Upgrade, module changes, and training plan.

Audience:
Each session is open to the entire Emory community.
Agenda

- What is PUM
- Module Updates
- Training Plan Overview
- Q & A
- Staying Connected
What is PUM?

PeopleSoft Update Manager

Emory’s PeopleSoft financials system (known within the community as “Compass”) was upgraded in November, 2016.

This upgrade enabled Emory to move to the new lifecycle management for PeopleSoft.

Oracle’s PUM (PeopleSoft Update Manager) process will enable Emory to avoid lengthy upgrade projects by remaining current with smaller releases (PUMs).
PUM vs Upgrade

PUM - PeopleSoft Update Manager - PUM

Upgrade

- 8 years with only 1 upgrade
- High level of change
- Some Emory Custom Solutions

PUM

- Mini-Update
- Low level of change
- PeopleSoft delivered solutions that match Emory’s enhancement requests
Project Timeline
Go Live – Early 2018

Core Team Testing Roles and Responsibilities

Ensure the system & people are ready

Testing Activities to Ensure the System is Ready

- Test Move 1
- Test Move 2
- Test Move 3
- Final Lap

Support UAT Labs
Stakeholders and Key Users
UAT Labs
Broader Community

Training Early 2018

Go-Live Early 2018
PEOPLESOF# FLUID
PeopleSoft Fluid

- Tile based look designed for mobile world
- Campus has seen Fluid with ELMS and HR PeopleSoft
PeopleSoft Financials Fluid

Six Home Pages

Each page will have maximum of six tiles

Tiles for High Volume Campus Transactions (not Central)

Advanced Navigation through Classic View

Tiles displayed depend on Compass Access
Fluid Home Pages

1. Employee Self-Service
2. Manager Self-Service
3. Grants
4. Finance
5. Procure to Pay
6. Emory Help

- Six Home Pages
- End User Focus
Fluid Home Pages

**Employee Self-Service**
- ✔ Landing Page
- ✔ Shortcuts to Common Transactions
- ✔ Some Entry Pages

**Manager Self-Service**
- ✔ Managers
- ✔ Approvals
- ✔ Security Driven

✔ Post-Award
Fluid Home Pages

**Emory Help**

- Log a Ticket
- Financial Systems Job Aid Library
- Compass Website
- Finance Website
Fluid Home Page Tour

- **Tile Navigation**
  - Employee Self-Service
  - Manager Self-Service

- **Advanced Navigation**
MODULE UPDATES
Accounts Payable

We are still in *discovery phase* of Accounts Payable.

PUM enhances *attachment capabilities* allowing multi-file uploads.

Most enhancement requests are *custom* and will be addressed *after PUM*.
No significant changes will occur in Travel & Expense Center for Central or Campus Users.

Training team will focus on eLearning updates to address FAQ’s and Best Practices.
General Ledger & Commitment Control

*No significant changes* will occur in *GL* and *KK* for Central or Campus Users.

*Spreadsheet Upload template* may have minor changes.

Training team will use PUM to enhance *eLearning* and educate users on beneficial 9.2 tools such as Budget Pages.
Workflow – All Users

**Approvals** investigation in progress.

Fluid **may offer better navigation** for approvals.

Approvers **may** be able to **filter by Transaction Type**.
PeopleSoft has introduced a **new approach** to WorkCenter Filters.

**Filter settings** for a user will roll up to a “**scope**”.

Multiple scopes **eliminate** the **need** for users to continually **change** filter variable **settings**.

Some WorkCenters may be accessible within the **Fluid Navigation** others will be accessible in **Classic View**.
Emory Express

Emory Express is a third party *hosted solution*.

JAGGAER implements *updates* on a *pre-determined* schedule; generally three per year.

Our *next* update is scheduled for *November 13th*.

In this update, we will release *Off-Campus Ship-To Request* form.

*We will provide more information soon.*
We do not expect significant changes in Treasury and Asset Management for Central or Campus Users.

We will provide more information once the discovery phase is complete.
Accounts Receivable/Billing

*No significant changes* will occur in ARBI for Campus Users.

- Ability to **search** by **Contract Number**
- Ability to **Save Advanced Search criteria** on Payment, Credit Card, Maintenance, Transfer, and Draft Worksheets
- Ability to **cross reference** Temp Bills and Approved Bills from the Bill Inquiry page
- **Vendor Address details** display when issuing **refunds**
Accounts Receivable/Billing

Central Updates

- Updates to **Direct Journals**
  - **Change Accounting** outside of Defaults
  - **Unpost** Direct Journals

- **Override** inherited **ChartFields** on write-off transactions on Payment and Maintenance Worksheet

- Enhanced **Receivables Update processing** to run for **all transactions** or for one or more transaction **types selected**

- **PCBU** required when entering **Express Bill** ChartFields
New *Grants Portal Search* capability for Campus users and Central.

- Ability to search by *Contract Number*
- *Change Accounting* outside of *Direct Journal* Defaults
- Additional *Contract Setup Chartfields*
  - *PCBU* and *Activity Codes* allows improved visibility to the source contract & contract line for General Ledger and Billing
TRAINING PLAN
Training will be determined based on the level of change.

• New Course Names & Numbers
• Course on Fluid
  • Short class and will be required
• Onboarding Document
Security  All Users

After PUM, new **9.2 users** are required to submit an **Online Access Request** form for Compass Access.

**Exceptions** include:
- ✓ Travel & Expense
- ✓ Payment Request

- **Complete** Training
- **Submit** Online Access Request Form
- **Receive** Access (2 days after approval)
Key Website Updates

Welcome to Compass 9.2
Compass is Emory’s enterprise-wide PeopleSoft Financials System. Emory has 2 Compass Systems:
1. Compass 9.2 Financials - where we do our work and enter transactions.
2. Compass 9.2 Reporting - where we run reports and look up data.

Additional Financial Systems
Emory Express is the University’s Procure to Pay System. It is where we buy goods and services and pay companies.
Emory Business Intelligence (EBI) is a data analysis and reporting tool which consists of the data warehouse and a business intelligence user interface.

Job Aid Library
Looking for quick and easy guidance on completing Compass transactions? Job Aids are step-by-step instructions with screenshots to guide you through transactions. Job Aids are housed in a new tool called PDF-Rio that allows for easy viewing and navigation.
Click here to access the job aid library.

Finance Support Center
Questions related to your work in Compass, EPEX, Emory Express or EBI-Finance?
1. Log a ticket (provides you with personal tracking)
    Community Website
Or by pasting the following URL into...
Be in the Know. Stay Connected

ATTEND

Events and Meetings
- Outreach Sessions
- User Acceptance Testing
- Other Compass-related events

VISIT

compass.emory.edu
- Review PUM updates
- Keep current with the latest news
- Catch-up and review presentations & recordings of past sessions

READ

Newsletter (bi-monthly) to the Compass Users ListServ
Contact compassupdate@emory.edu to get on the ListServ

REACH OUT

Send emails to compassupdate@emory.edu
For any questions, comments, concerns

MEET

Communications Council Members & Peer Experts
- Division level contacts who communicate key Upgrade messages within the department or division, and support their respective user community within their divisions.