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

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

PUM · PeopleSoft Update Manager · PUM
Compass Enhancements

**PUM** is designated for **PeopleSoft** delivered functionality.

*Custom enhancements* will be addressed *after PUM*. 
Project Timeline
Go Live – Early 2018

Test Move 1
Test Move 2
Test Move 3
Final Lap

Testing Activities to Ensure the System is Ready

Core Team Testing Roles and Responsibilities

Ensure the system & people are ready

Support UAT Labs
Stakeholders and Key Users
UAT Labs
Broader Community

Training Early 2018

Go-Live Early 2018
PEOPLESOFTR 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
- 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
Fluid Home Pages

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

**Manager Self-Service**
- Managers
- Approvals
- Security Driven
Fluid Home Pages

**Grants**
- EPEX
- Grants
- Contracts
- Billing & AR
- Project Costing

**Procure to Pay**
- Accounts Payable
- Travel & Expense
- PO Close Requests

**Finance**
- Assets
- Commitment Control
- General Ledger
- Non-Grants Billing & AR
Emory Help

- Log a Ticket
- Financial Systems Job Aid Library
- Compass Website
- Finance Website
MODULE UPDATES
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.
Workflow – All Users

Approvals investigation in progress.

Fluid *may offer better navigation* for approvals.

Approvers *may be able to filter by Transaction Type.*
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*. 
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.
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.

We will provide more information soon.
Grants

New **Grants Portal Search** capability for Campus users and Central

The ability to **search by contract number** within AR module

Central will enter **additional Contract ChartFields** which will appear in General Ledger

✓ **PCBU**
✓ **Activity Codes**
TRAINING PLAN
Training

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

**Exceptions** include:
- ✔ Travel & Expense
- ✔ Payment Request
Key Website Updates

New PUM page!

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.

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-Flip 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

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Get Trained!

For Employees
Training is required for access to Emory’s Financial Systems. If you are new to Emory’s Financial Systems, follow these steps to get trained and stay informed.

1. Use the Financial Systems Onboarding Tool to locate your courses
2. Register for courses in https://emprod5.emory.edu
   - Remember to register for the required Institutional Data Management (IDM) course
3. Complete the required Institutional Data Management (IDM) course and the additional courses identified on the Onboarding Document
4. Submit the On-Line Access Request form for the applicable system as outlined in the Finance Job Aid Library
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.