Countdown to Training!

GO LIVE - November 14, 2016

The decision to Go-Live on November 14th was based on a number of key factors including:

**Time for Testing.** We need to be certain that our testing phases are designed to ensure the functionality is thoroughly inspected by the user community.

**Time for Training.** We need to make sure that we have enough time built into the schedule for our users to complete their training plans successfully.

**Black-Out Dates.** We have to be sensitive to the competing priorities tied to the financial, academic and research calendars that could impact staff engagement. (Year-end closing, students returning, etc.)

“We are entering the most critical phase of the Compass Upgrade as we prepare for Go-Live. Following over a year of project work driven by community-defined business needs, our Go-Live success will be defined by how well we execute our user testing, training and operational preparations. Look for communications with your individual learning program in April and register for training right away. Take advantage of interactive labs and other opportunities that will be provided to enhance your confidence in the upgraded system. Thank you.” --- Carol Kissal, Vice-President of Finance / Chief Finance Officer

When does formal training begin?

Visit the Compass Upgrade website to learn more about Training.

For easier viewing, zoom in or click on the timeline image to view on the website.

**Compass Upgrade Training Methods:**

<table>
<thead>
<tr>
<th>Heavy User*</th>
<th>Non Heavy User</th>
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<tbody>
<tr>
<td>Classroom Training</td>
<td>eLearning</td>
</tr>
<tr>
<td>Webinars</td>
<td>eLearning in a lab</td>
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**All Compass Users**

- Job Aids
- Recordings of classroom and webinar sessions
- Client Support Center

**Learning Programs**

**What Courses will I take?**

Your Learning Program (course and type of training) is based on your historical Compass use in each module. For example if you are a Heavy User* in the Expense module, then your learning program will include classroom training. If you use the Expense module but are not a Heavy User, your coursework will likely be eLearning.

**REQUIRED TRAINING**

SEE The default setting for all users will be “view access” for the modules they had access to in Compass 9.0 prior to Go-Live.
Visit the Compass Upgrade website to learn more about training methods and course descriptions on the Training tab of the website.

**Word of the Day**

*Heavy User (hevɪ juː zər)* n. Compass user who creates more than the average number of transactions in a module over a 1-year period (Feb. 2015 – Feb. 2016)

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**Compass Outreach Sessions Update**

Thank you for attending the Compass Outreach Sessions. Since April 2015, more than 1,200 of you have joined us to learn about the Compass Upgrade changes and how they will impact you. Topics included: Travel & Expense, Accounts Payable, General Ledger, SmartKey, Reporting, Grants, Workflow, WorkCenters and Training Plan. Check the website for the PowerPoint slides and Session Recordings.

175 attendees took home raffle prizes!!

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**DO** In order to receive transaction initiation privileges, users must complete required module-based training to ensure they understand the changes in the upgraded environment and can be successful in their assigned roles.

**PLAN** Users and their managers will have the option to review training plans together, **prioritize and complete the most critical training** prior to Go-Live and continue to complete additional training as higher levels of access privileges are needed.

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**Introducing the Client Support Center Project Launch!**

Emory University Finance is introducing a new Client Support Center (CSC) hosted in Salesforce Service Cloud. Salesforce Service Cloud consolidates and streamlines support tickets.

Salesforce is the number one customer service platform. The Salesforce Service Cloud allows users to automate service processes, streamline workflows and effectively support the user community. The end result is an interactive user experience promoting client support and self-service, for both internal/external clients.

The introduction of Salesforce Service Cloud will precede the onset of formal Compass Upgrade training. Compass users can expect an enhanced support experience as we move toward a Compass Upgrade go-live date of November 14, 2016.

Stay tuned for more information in April.

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**Interactive Labs**

Beginning this spring, selected Compass Users will be invited to attend Interactive Labs which provide users with an opportunity to practice in a demo environment. Additional opportunities for this hands-on experience will be open to the broader user community beginning in June.

Stay tuned for more information.

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**In Your Department or Division – Peer Experts**

**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 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 the **Peer Expert Council** members in your division.

<table>
<thead>
<tr>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>✓ Attend Compass upgrade previews.</td>
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<tr>
<td>✓ Participate in User Acceptance Testing (UAT).</td>
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<tr>
<td>✓ Participate in training dry run and provide feedback on training.</td>
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<tr>
<td>✓ <strong>Provide first line support to Compass users during and after training.</strong></td>
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<tr>
<td>✓ Maintain list of questions and note areas of confusion among end users. Relay information back to the Compass Transition team.</td>
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For information on managing your Emory listserv subscriptions, click the following link: http://it.emory.edu/catalog/email_list_service/

Visit the website at: [upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)

**CONTACT US.** Questions? Suggestions? Tell us what you think. Email us: compassupgrade@emory.edu