

The Compass Upgrade

Issue 2
May 11, 2015

Insight

SPOTLIGHT ON:



Accounts Payable and Travel & Expense

During May and June, website

content and Campus Outreach sessions are focusing on the Accounts Payable (A/P) & Travel and Expense (T&E) modules.

Check the website for updates to AP and T&E Listening Tour questions and requests as well as a PowerPoint slide deck outlining the Approved Business Cases.

► [Accounts Payable](#)

► [Travel & Expense](#)

Meet the Project Lead



Recently, Belva White, who serves as the Compass Upgrade Project Team Lead and as the Co-Chair of the Steering

Committee sat down for an interview to address some **What, Why and When** upgrade questions.

1. *What is the Compass upgrade?*
2. *Why upgrade now and where are we in the process?*
3. *What are the biggest impact areas for users?*
4. *How will this be different than the 2009 implementation?*

► [Watch the interview](#)

WHAT'S HAPPENING?

Board of Trustees Approval – March 2015

The Compass Upgrade project received Board of Trustees approval on March 26, 2015. This means the project can move forward with subsequent phases.

Website Launch – May 11th

Visit the website for more information on any of the topics in this newsletter and much more.

► [Visit Us.](#)

Staff Fest – May 15th

Got Questions? Visit our table and meet members of the leadership team. We want to hear from you.

► [Upcoming Events](#)

Design Documents Underway

Design work and testing is progressing on all of the workstreams. Click below and expand the section called “Project Workstreams” to learn more.

► [Project Workstreams](#)

WHAT'S COMING UP?

June 2015

SpeedType (formerly SmartKey) Interactive Labs – June 3rd, 11th, 17th

SmartKey (a third party tool which sits “on top of” PeopleSoft to provide a shorter entry key than the full 70 digit ChartField string) will be replaced with delivered functionality called SpeedType. This change will enable Emory to benefit from similar “short key” functionality and allow us to take advantage of ongoing patches and updates previously unattainable.

If you use Compass regularly for journal entries or other tasks with SmartKeys, you are invited and encouraged to participate. During the lab, you will enter transactions using different SpeedType configurations designed by the Steering Committee and make the final decision on which is selected. **Your vote counts and will drive the final design so please participate!! Our goal is to reach 240 participants- register now!**

► [Register](#)

***Search for the SpeedType Interactive Lab course (course #260353) Click [here](#) for instructions on how to enroll.**

Compass Outreach Sessions

Stay tuned for dates and locations across campus to learn more about what’s changing with Accounts Payable and Travel & Expenses.

UPDATES FROM LISTENING TOURS & OUTREACH SESSIONS

Compass User Request: (T&E) I would like to be able to look at other people's expense reports to tell them the status.

Update: *The upgraded functionality will allow the manager/auditor roles to see other employee's expense reports. In the future, you will navigate via Travel and Expenses > Expense Reports > View. The search page will show the report status.*

Compass User Request: (AP) Can the assignment of approvers for a unit be managed by the unit instead of having to request Central to make a change.

Update: *We are hoping to be able to do this. We have it in a business case and you will hear more about this in the workflow updates. Everyone is on board conceptually, we just have to see if we can develop something that works well for users.*

Compass User Request: (T&E) Instead of printing the T&E summary as a screenshot, can you allow the ChartField summary to be printed as a pdf?

Update: *The upgraded Compass will allow T&E summary and ChartField information to be printed on the same document. Users will use the "Print with Barcode" option to do this.*

Compass User Request: (AP) How will we handle vendors with multiple addresses?

Update: *The new functionality will accommodate multiple addresses. We will have separate links with one name link based on the hierarchy.*

Please click the link below to download a list of all questions and answers collected thus far from Compass Outreach sessions.

[▶ Parking Lots](#)

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

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