**Summary of Content:**

IDM eLearning | OUTLOOK EVENTS | EXPENSE SUMMARY REPORT | UAT

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.

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**The Compass Readiness Checklist**

**September 2, 2016**

**T-11** Weeks to Go-Live

*Click [here](#) to view T-12 Compass Readiness Checklist*

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<table>
<thead>
<tr>
<th>AUDIENCE IMPACTED</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRAINING</strong></td>
<td></td>
</tr>
<tr>
<td>Emory Healthcare</td>
<td>IDM (Institutional Data Management) eLearning</td>
</tr>
<tr>
<td></td>
<td>Emory Healthcare (EHC) employees who use any of the Financial Systems (Emory Express, EPEX, Compass and EBI) are <strong>exempt from the IDM course</strong> due to their annual completion of EHC sponsored compliance training.</td>
</tr>
<tr>
<td>Emory University</td>
<td></td>
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<tr>
<td></td>
<td>Emory University (EU) employees who use any financial system (including Compass, EPEX, Emory Express and EBI) <strong>must complete the IDM eLearning</strong> course. The IDM course is required for you to have any access to Compass.*</td>
</tr>
</tbody>
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*In order to have View or Transactional access to any modules at Go-Live you must complete this course prior to October 31. For more background information on data management policies please click [here](#). [Register on the ELMS](#) (Course 410001)

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<table>
<thead>
<tr>
<th>‘Heavy’ Compass Users *</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Block Your Calendar</strong></td>
</tr>
<tr>
<td>After you register in the ELMS for your classroom or webinar course, remember to add the event to your Outlook Calendar. You will receive a reminder email one week prior to the class which will include all of the jobs aids associated with the class.</td>
</tr>
</tbody>
</table>
Heavy User: Compass user who creates more than the average number of transactions in a module over a 1-year period (Feb. 2015 – Feb. 2016). Heavy users are scheduled into classroom based or webinar sessions.

NEW FEATURES AND FUNCTIONALITY

Travel and Expense Module:

New Expense Report Summary

The Compass 9.2 Expense Report Summary page includes all of the Trip and Transaction detail from the Expense Report along with the Accounting detail.

1. **Overview** lists the last four digits of the Employee’s Emory Corporate Visa Card or Purchasing Card, which is useful when reviewing receipts.
2. The employee’s Name, Empl ID, Description, Business Purpose, and Reference.
3. **Report ID** (also shown as a barcode at the top), **Status**, **Beginning** and **End Dates**, **Destination**, and **Notes**.

4. Each expense line appears as two lines in the summary. If an expense line has split distributions, a line for each distribution appears with the distribution amount and ChartFields.
   a. The top line shows information about the expense including:
      - Receipt? (Y = Receipt Attachment; N = No Receipt Attached).
      - Reimb? (Y = Reimbursable; N = Non-Reimbursable).
      - Expense Method (PER = paid for with personal funds; VIS = VISA Corporate Card).
   b. The bottom line, or lines, displays the accounting details, including the **Project Type** (FED, NONFED, etc.)

5. A total of the expenses appears at the bottom of the screen along with the payment distribution.

*Travel and Expense Classroom and Webinar training is scheduled October 3-7. ELearning will be available mid-September.*

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**USER ACCEPTANCE TESTING**

Peer Experts

**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
   - [https://www.surveymonkey.com/r/UATPLAY](https://www.surveymonkey.com/r/UATPLAY)

3. **CALL** if you need help.
   - 77000 or 404-727-7000

*The “Play” environment will be open to all users who complete training September 19 – November 11.*

*Healthcare Compass Users: If you have any questions related to UAT, please contact [Lori Ronalder](mailto:Lori.Ronalder@emory.edu).*

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For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact [compassupgrade@emory.edu](mailto:compassupgrade@emory.edu)