The Compass Readiness Checklist

October 24, 2016

**T-15 days* to Go-Live  (*business days)**

*Click [here](#) to view last week’s T-5 Compass Readiness Checklist*

*Click [here](#) for a PDF version of this week’s T-15 days Compass Readiness Checklist*

<table>
<thead>
<tr>
<th>AUDIENCE IMPACTED</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRAINING</strong></td>
<td></td>
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</table>

**Time is running out!**

If you have not yet completed your **required** training, here are your options:

1. Attend the ARBI and/or Reporting classes the week of October 23rd.
2. Watch a Recorded Classroom Session  ([recorded session titles currently available](#))
3. Take eLearning classes  ([eLearning titles currently available](#))
4. Register for a make-up session scheduled the week of November 7th.

**Healthcare** users have unique training and UAT requirements. Specific Healthcare questions should be directed to Lori Ronalder.

### Training Key Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>October 31st</strong></td>
<td>If you complete your training by this date, you will have transactional access at Go-Live (11/14/2016)</td>
</tr>
<tr>
<td><strong>November 14th</strong></td>
<td>If training is completed between Nov 1st and Nov 14th, Compass users will receive transactional* access by noon on November 17th.</td>
</tr>
<tr>
<td><strong>After November 14th</strong></td>
<td>If training is completed after November 14th, users will receive transactional* access within 2 business days after completing training requirements and submitting a Compass security form to the Finance Support Center.</td>
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</tbody>
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(*At Go-Live, Compass users will have view access to all of the modules that they currently have access to however they will not be able to complete Compass transactions in a module until they complete the required training for that module.)

### Operational Compass Transaction Deadlines

<table>
<thead>
<tr>
<th>Users</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compass</td>
<td>unavailable</td>
</tr>
<tr>
<td>EPEX Users</td>
<td>November 10-14</td>
</tr>
<tr>
<td>Emory Express Users</td>
<td>November 10-14</td>
</tr>
<tr>
<td>EBI</td>
<td>unavailable</td>
</tr>
<tr>
<td>RPT environment and EBI</td>
<td>unavailable</td>
</tr>
</tbody>
</table>

From noon on November 13 until noon November 15.
Required versus Recommended Expense Training

- If you are an Emory Healthcare employee and only enter Expense Reports for Healthcare departments then you are not required to go to training for T&E.

- If you are an Emory Healthcare and enter Expense Reports for University employees, you must complete Expense training. (Course 260454)

Please contact Lori Ronalder if you have any questions about which Healthcare Compass courses are required.

Classroom and Webinar Training Schedule

**OCTOBER 24-28**
What’s New in Compass Reporting? - webinar (Course # 260449)
- Wire Claims Enhancements (Course # 260459)
- Collection Workbench and WorkCenters (Course # 260421)
- Asset Management for Healthcare Users *
- Accounts Payable for Healthcare Users *
- Accounts Receivable/Billing for Healthcare Users *
- General Ledger for Healthcare Users *
- Treasury for Healthcare Users *

**OCTOBER 31-NOVEMBER 4**
Open Lab Week (check schedule)
- Various Topics: General Ledger, WorkCenter, Commitment Control, ARBI (ePay Enhancement, Wire Claims, WorkBench), Workflow, Security, Reporting Learning Lab, Grants, Travel & Expense, Accounts Payable, Emory Express
Click [here](#) to view the Open Lab schedule including course number, time and location information.

*Healthcare* will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact [Lori Ronalder](#).

If any of the above **classroom** courses are included in your Compass Upgrade Learning Plan, please register on the [ELMS Registration Job Aid](#).

**Congratulations Karen and Benjamin!**

During each week of training*, 2 Compass users are selected to receive a $50 [Barnes & Noble](#) Gift Card.

**October 10th – 14th Winners:**
- *Karen S Hawkins*, (FGC), **Course**: Accounts Receivable for Grants (Classroom)
- *Benjamin Hopkins* (GBS), **Course**: Emory Express for Compass Users (eLearning)

*The winners will be selected from those who either 1) attended class or 2) completed eLearning from Monday-Friday of that week.*

**By the Numbers**

864 people have completed at least one training session (classroom, webinar, or eLearning) as of 10/14. **Keep in Mind**: Your transactional access to Compass 9.2 is based on training completion.

**Important Links**
- [Training Schedule](#)
- [Compass Upgrade Website](#)
- [How to Launch an eLearning Course](#)
- [How to Register for Training](#)
<table>
<thead>
<tr>
<th>ELMS Key Dates</th>
<th>Important Announcement – Research Proposals End of Course Assessment information</th>
</tr>
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<tr>
<td></td>
<td>For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact</td>
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<tr>
<td></td>
<td><a href="mailto:compassupgrade@emory.edu">compassupgrade@emory.edu</a></td>
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<tr>
<td></td>
<td>Check the website for more Compass Upgrade information: upgrade.compass.emory.edu</td>
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