

## Summary of Content:

[NOVEMBER 7-11 CHECKLIST](#) | [SYSTEM SHUTDOWNS](#) | [NOVEMBER 14-18 SUPPORT](#) | [TRAINING SCHEDULE](#) | [LINKS](#)

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](#)



# The Compass Readiness Checklist

November 4, 2016

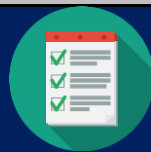
**T-6 days\*** to Go-Live (\*business days)

Click [here](#) to view the T-10 days Compass Readiness Checklist

Click [here](#) for a PDF version of this week's T-6 days Compass Readiness Checklist

**AUDIENCE  
IMPACTED**

**TOPIC**



**TRAINING - Countdown to Go-Live Final Checklist**

November 7-11 [Note: System Shutdown on Thursday and Friday]

- Attend** classroom or webinar live training for your 'mission critical'\* training courses. [Additional classroom sessions](#) were added to the Make-Up Week (**Nov 7-11**).
- Complete eLearning** (9 titles) or **recorded sessions** for your 'mission critical' training courses. Course names and numbers are available on the [website home page](#).
- Prepare** for cutover and the [timing of system shutdowns](#). Be aware of Operational Transaction deadlines.

- ☐ Go into the [ELMS](#) and **check the status** of your completed training. Contact Transition Support if you passed the course assessment and the status is still **In Progress**.
- ☐ **Review:** Your classroom training or eLearning may have occurred weeks ago so it's worth reviewing the materials so that they are fresh in your mind.
  - **Recordings of Classroom sessions** (for reference and review only) are available **directly from the website**. Check the [News & Events](#) tab on the website. Note: To receive course credit, you need to access the recordings via the ELMS.



- **Review Job Aids:** 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.

- ☐ **Practice makes Perfect.** Explore in the 'play' environment. <https://fclone.emory.edu>

Use your normal User ID and Password to log-in

	Nov 9 Wed	Nov 10 Thurs	Nov 11 Fri	Nov 12 Sat	Nov 13 Sun	Nov 14 Mon	Nov 15 Tues	Nov 16 Wed	Nov 17 Thurs
Compass Production Environment		Off-Line from 11/10 until Noon on 11/14							
EPEX		Off-Line from 11/10 until Noon on 11/14							
Emory Express		Off-Line from 11/10 until 5pm on 11/14							
Compass RPT (Reporting Environment)					Off-Line				
EBI - Finance					Off-Line from 11/13 until 11/17				
EBI – Student (no impact)									

**November 10<sup>th</sup> -14<sup>th</sup>:** Users will **not** be able to access [Compass](#) or [EPEX](#) from Thursday, November 10, 2016 until noon on Monday, November 14, 2016. Emory Express will not reopen until 5:00pm on November 14<sup>th</sup>.

## \*What is 'Mission Critical' training?

Each Compass user has **specific Compass transaction types that they must complete in order to do their job**. The training associated with those transactions is 'mission critical' for that user and they should complete that training prior to Go-Live. For example, if submitting journals is a daily or weekly activity for you, then you should focus on completing the "What's New in General Ledger?" course. If, on the other hand, you rarely submits expense reports, you can complete the T&E training when you actually need to enter an expense report. That can be anytime between now and August 30, 2017.



**GO-LIVE – NOVEMBER 14<sup>TH</sup>, 12:00PM**

## November 14-18

### Additional Training and Support

- Live Webinar sessions** were added to the schedule: **November 15, 16, 17, 21 and 22**: What's New in Accounts Payable? What's New in General Ledger? Travel and Expense Enhancements.
- Attend an Open Lab** (Nov 15-16-17): Subject Matter Experts on-hand. Drop-Ins are welcome. Check the [Open Lab schedule](#) for topics, locations and times.
- Finance Support Center:**
  - *Email:* [Finance.Support.Center@emory.edu](mailto:Finance.Support.Center@emory.edu) (beginning November 14<sup>th</sup>)
  - *Phone Number:* **7-7000 or 404-727-7000** Monday through Friday during the hours of 9:00 a.m. until 3:00 p.m.
  - *Online:* url coming soon

### Getting Transactional Access After Go-Live



**November 14<sup>th</sup>:** If training is completed between Nov 1<sup>st</sup> and Nov 14<sup>th</sup>, Compass users will receive transactional\* access by noon on **November 17th**, if not before.

**After November 14th:** If training is completed after November 14<sup>th</sup>, users will receive transactional\* access within **2 business days** after completing training requirements and submitting a Compass security form to the Finance Support Center.

(\*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.)

**Managers**

- Check Training Completion Metrics** for your team. Training registration reports have been provided to managers on a bi-weekly basis and is available via an EBI dashboard.
- Encourage your **team to complete ‘mission critical’** training by November 11.
- Meet with staff to practice** and review transactions in FSCLONE ‘Play’ environment.

**Compass Users**

**NOVEMBER 7 - NOVEMBER 11** (Click [here](#) to view Make-Up class schedule)

NOVEMBER 2016						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**Make-up Classes – Classroom Sessions**

- What’s New in Accounts Payable? (260415)
- Travel & Expense Enhancements (260450)
- What’s New in General Ledger? (260432)
- ePay Enhancements (260420)
- Accounts Receivable – Grants (260437)
- Letter of Credit Management (260447)
- Collection Workbench (260421)





**NOVEMBER 15-17;**  
**NOVEMBER 28-DECEMBER 2;**  
**DECEMBER 12, 14 AND 15**

**Open Lab Week(s) Walk-Ins Welcome!**

- Various Topics: General Ledger, WorkCenter, Commitment Control, ARBI (ePay Enhancement, Wire Claims, WorkBench), Workflow, Security, Reporting Learning Lab, Grants (*check for Grants lab topics on the schedule – link below*), 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](#)*

### Important Links

[Training Schedule](#)

[Compass Upgrade Website](#)

[ELMS](#)

[Key Dates – Training Completion](#)

[Compass Cutover Dates](#)

[How to Launch an eLearning Course](#)

[How to Launch a Recorded Session](#)

[How to Register for Training](#)

[Important Announcement – Research Proposals](#)

[End of Course Assessment information](#)

For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact

[compassupgrade@emory.edu](mailto:compassupgrade@emory.edu)

Check the website for more Compass Upgrade information: [upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)